Title:	Electroservices (Midlands) Ltd. – Client Area Website User Guide (Ref: ESCLWEB001_r2)
Last Updated:	1st July 2011
Category:	Website
Revision:	2

Summary:

This document is intended as a user guide on the client area, within the Electroservices website. (www.electroservices.biz)

***Please note this document is for illustration purposes only, no client specific information is intended.*
***Screen shots may vary from the actual site when upgrades are implemented.*

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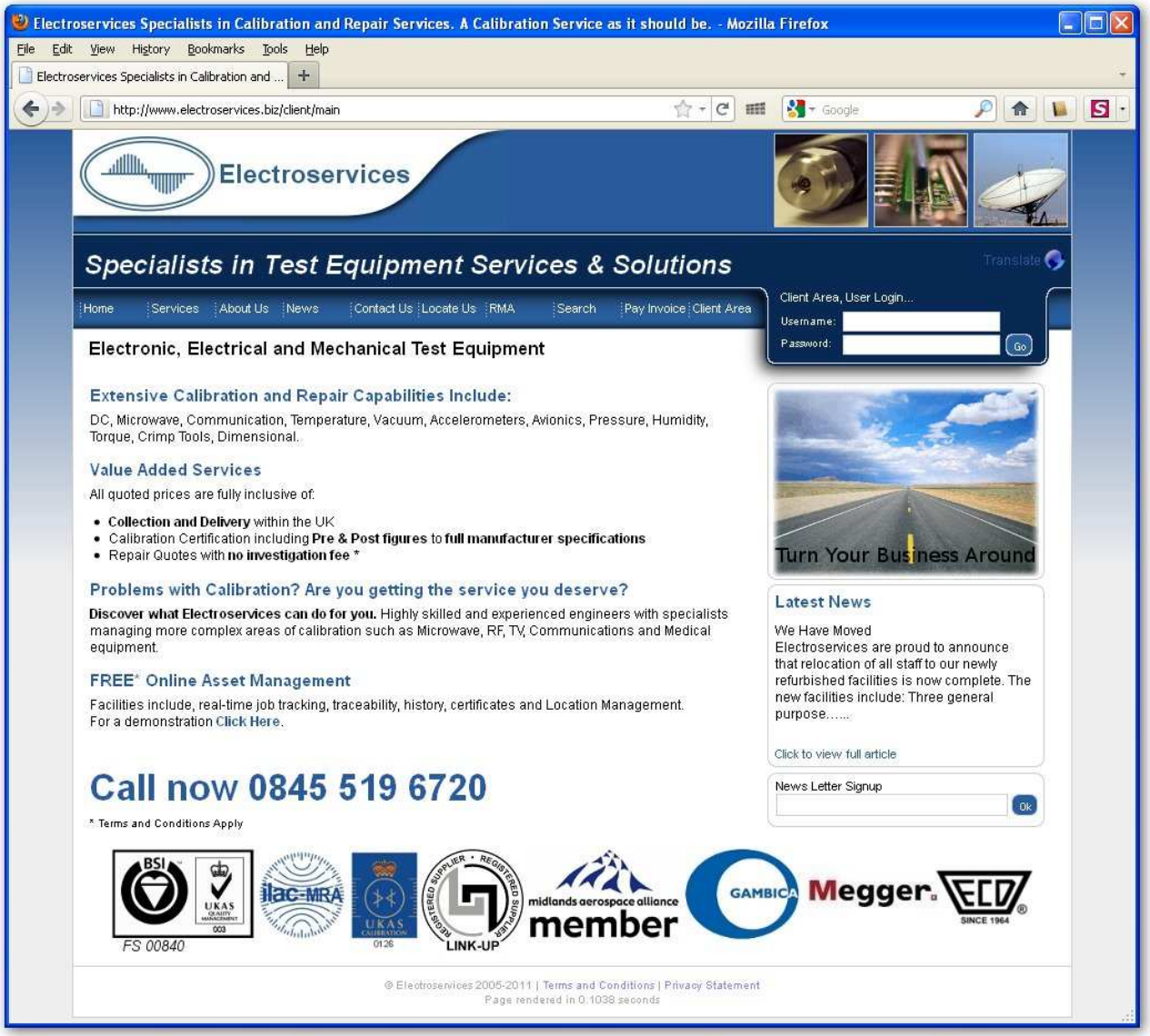
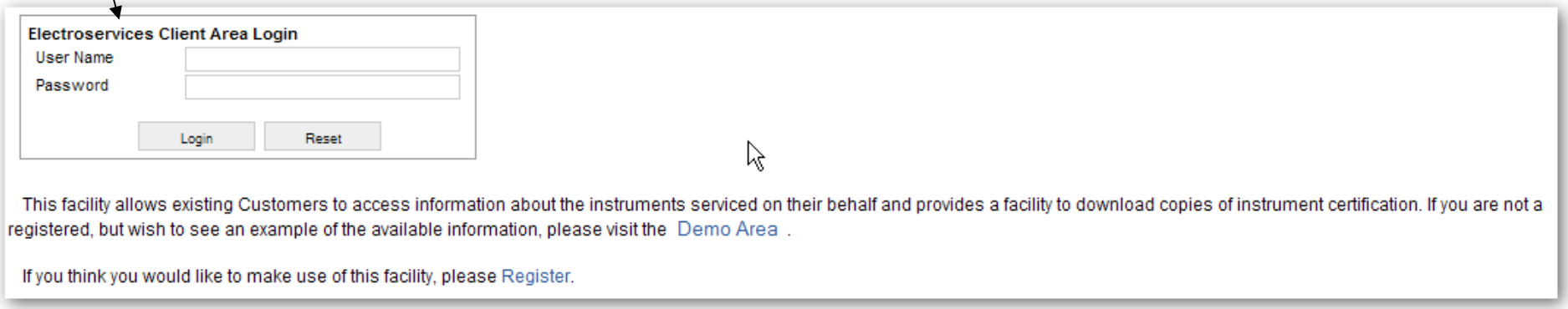
- Section 7 – Documents
- Section 8 – Assets
- Section 9 – Accounts
- Section 10 – Account Administration
- Section 11 – Enquiries
- Section 12 – Technical Information
- Section 13 – Document History

Section 1 – Home Page



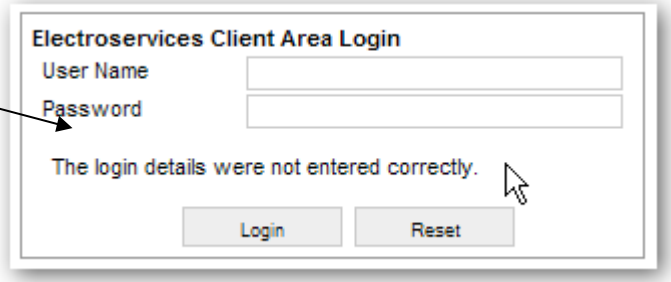
The Client Area is accessed by a single click on the ***Client Area*** link on the main navigation panel, menu bar or directly type in your *Username* and *Password* and click ***GO***.

Once this has been done the screen will change to Client Area Login page as follows:-

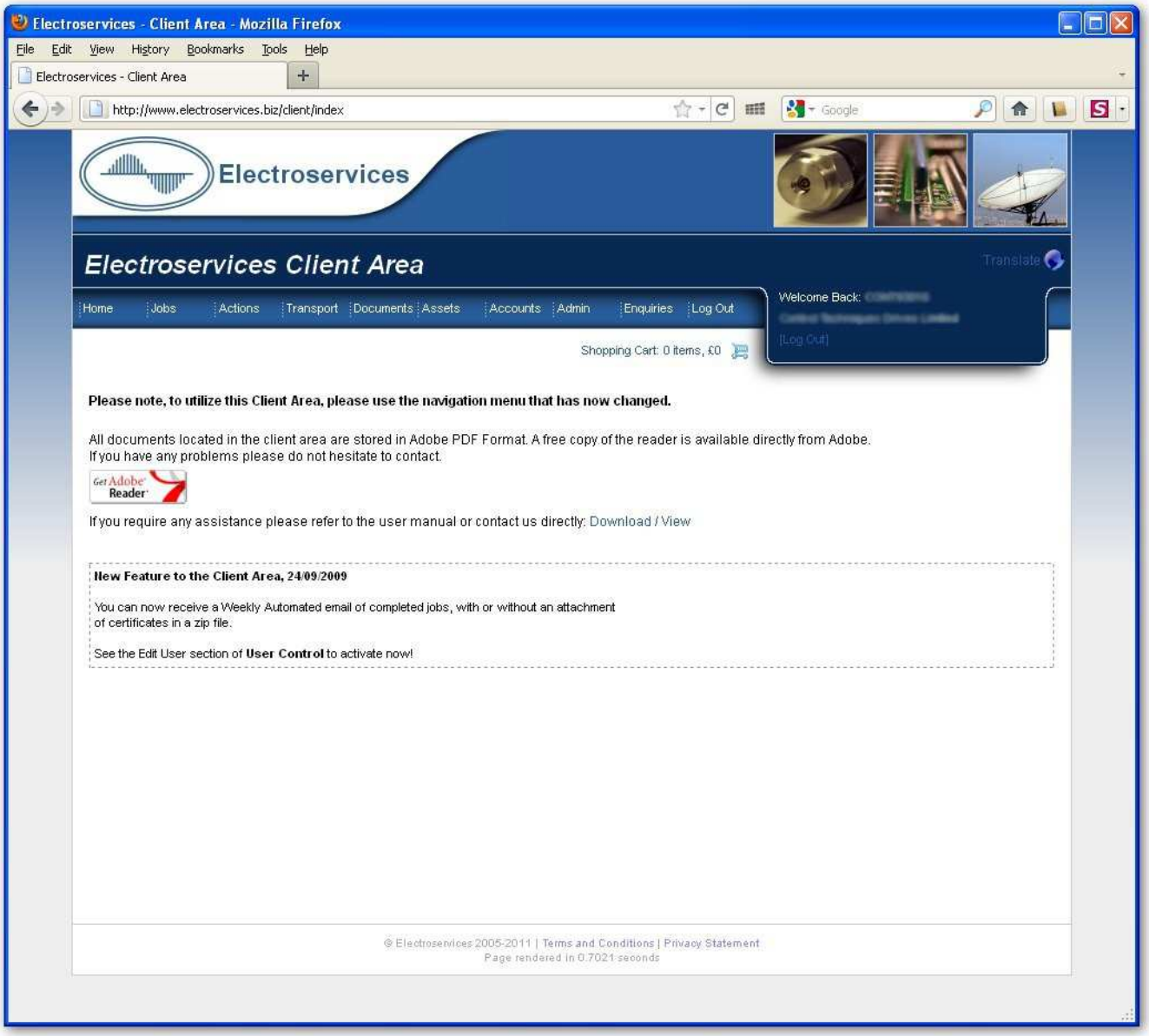


The main user account password that is initially allocated to new users, is created by Electroservices.
Once a customer has access, new users can be setup and assigned passwords by the main account.
The main account and new users can change their passwords as and when required.

If an incorrect username and/or password is entered there will be an error message shown.



after a successful login the Navigation panel will change, with the welcome page.


Electroservices - Client Area - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Electroservices - Client Area
http://www.electroservices.biz/client/index
Google
Electroservices
Electroservices Client Area
Translate
Home Jobs Actions Transport Documents Assets Accounts Admin Enquiries Log Out
Welcome Back:
[Log Out]
Shopping Cart: 0 items, £0
Please note, to utilize this Client Area, please use the navigation menu that has now changed.
All documents located in the client area are stored in Adobe PDF Format. A free copy of the reader is available directly from Adobe.
If you have any problems please do not hesitate to contact.
Get Adobe Reader
If you require any assistance please refer to the user manual or contact us directly: Download / View
New Feature to the Client Area, 24/09/2009
You can now receive a Weekly Automated email of completed jobs, with or without an attachment of certificates in a zip file.
See the Edit User section of User Control to activate now!
© Electroservices 2005-2011 | Terms and Conditions | Privacy Statement
Page rendered in 0.7021 seconds

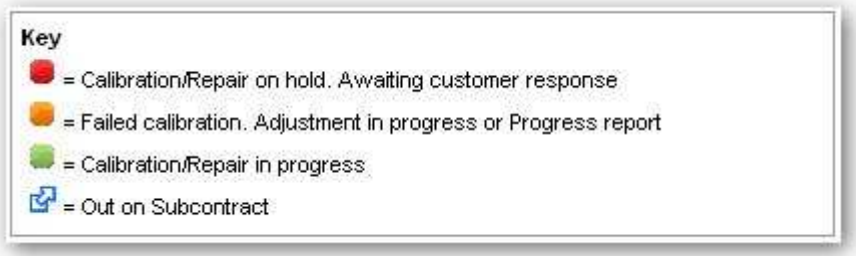
Section 2 – Navigation Menu

The menu is designed to be simple and straight forward, each option will be described in detail, further through this document.
Hover over one of the main menu options , eg Jobs to see a drop down list of available sub-options

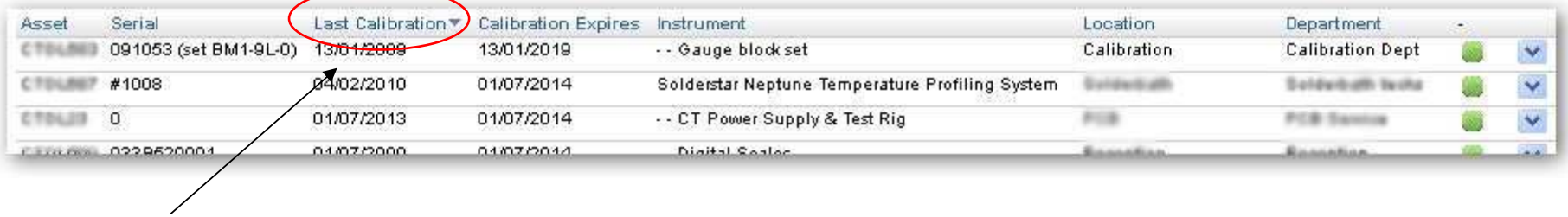
Note, any announcements we make for all customers, will be shown on the Welcome page such as new site developments eg, 'Traffic Light' features and emails

Section 4 – General Information

The new 'Traffic Light' system is there to provide a quick visual aid, and indicate the current status of the customer's asset(s).



Sorting



If a table heading is blue, there is the functionality to sort by that column name, in ascending or descending order.

Printing

Wherever the user sees this link [Print Page] if clicked, the browser will present a new window with a formatted page, ready for printing.

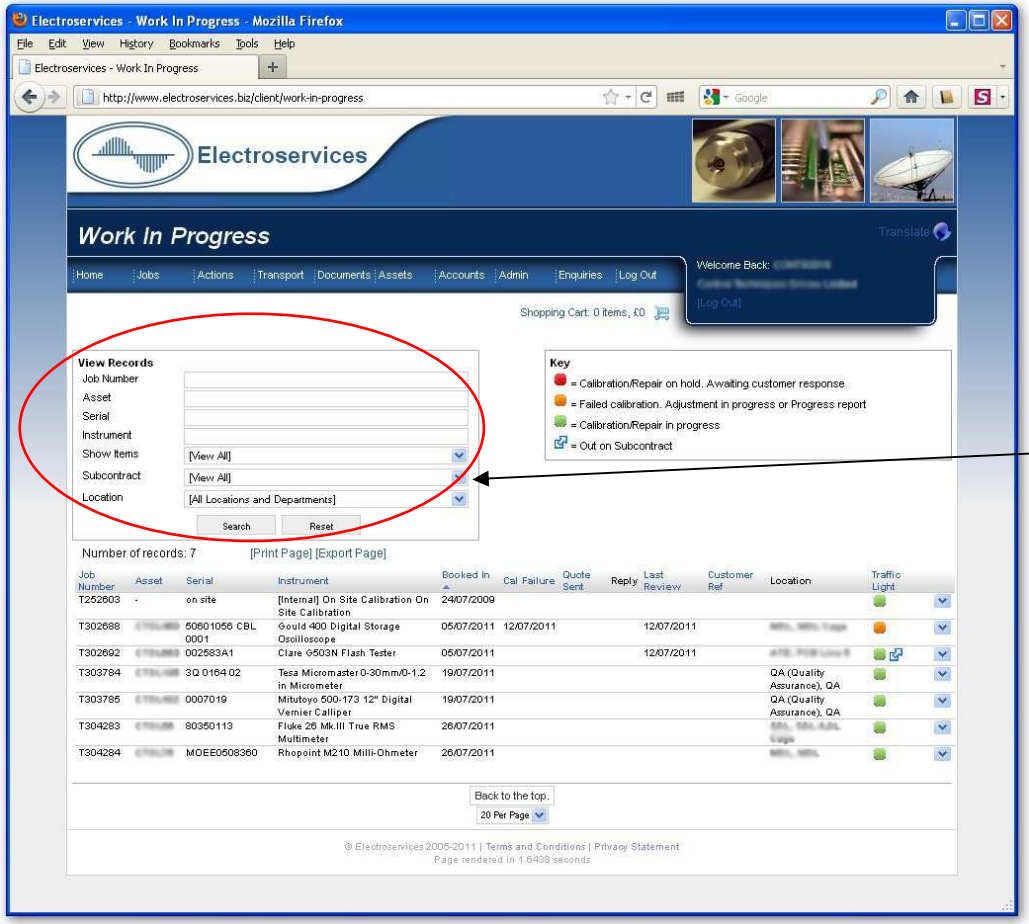
Export

Wherever the user sees the link [Export Page] there is the ability to export that web page into a CSV file and subsequently open via Microsoft EXCEL, OpenOffice/Libre Office etc.

Section 5a – Jobs

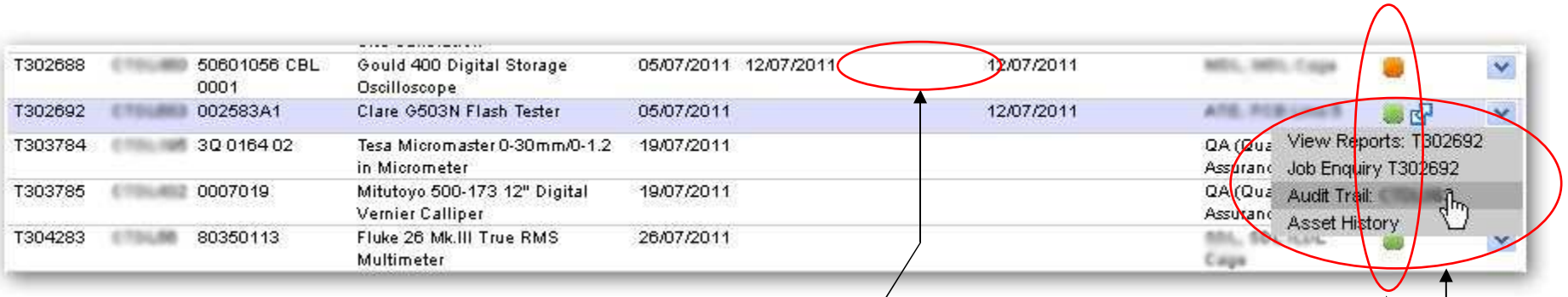
In this section, the user can view jobs and assets that they have been assigned to (more on this later in the User Control), where they are currently in progress, been completed, recalibration required dates, calibration expired and search.

Work In Progress



The **Work In Progress** page displays a list of all the customers instruments that are currently being worked upon (that the user has access to). This area is live, as soon as items are booked in to Electroservices they will appear on the website.

The user has the ability to search for a piece of equipment either by job number, asset number, serial number or instrument name.



If there is a Quote awaiting clearance, the user can ***Accept*** or ***Reject*** by clicking the link this will then send Back a reply (with any notes you may have) back to the Service Manager.

Next to each item, there is an **Action** drop down list. This enables the user to view various categories such as reports for their chosen instrument; ie, failure report, audit trails, history etc.

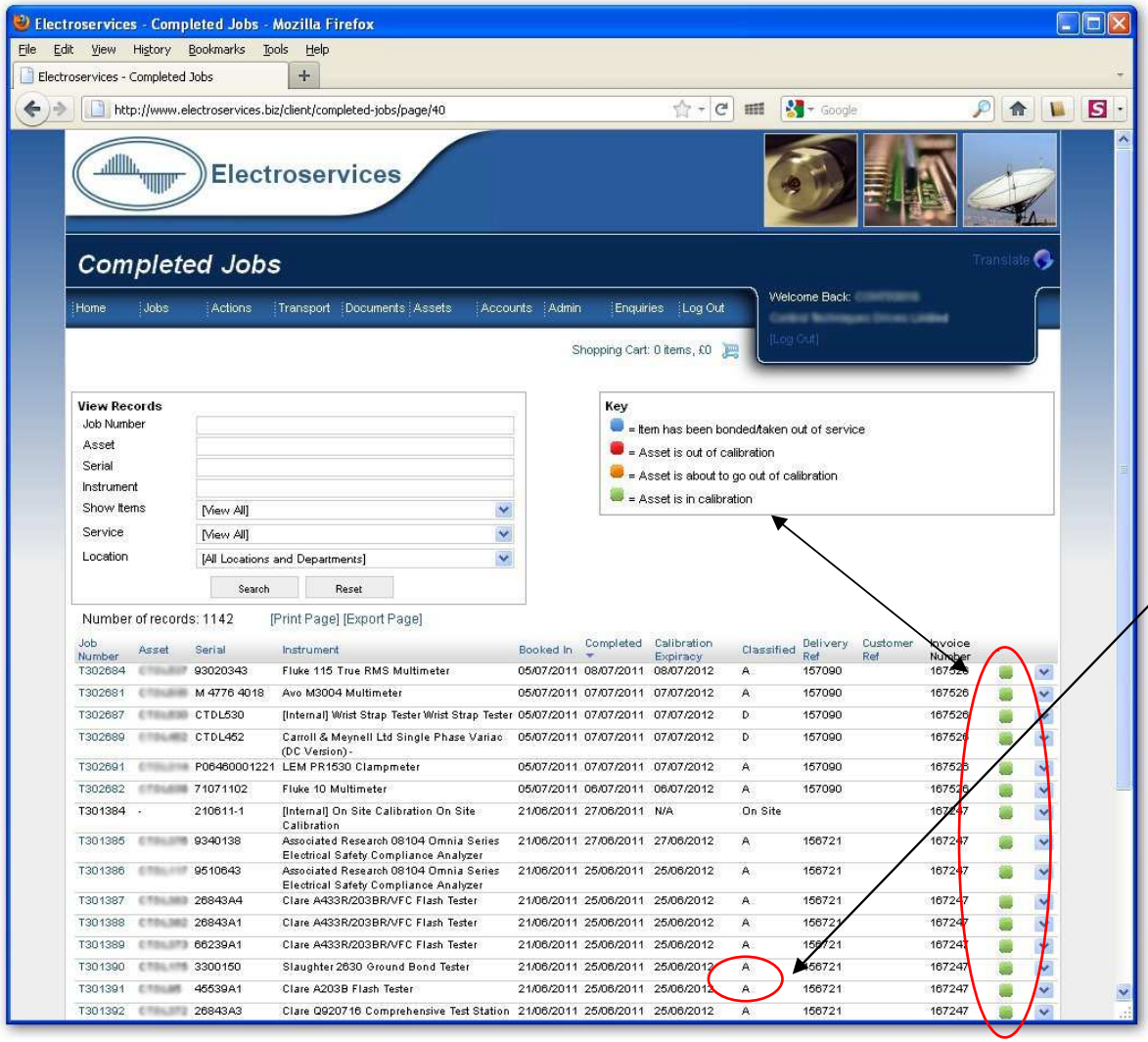
To activate this list, just move the mouse over the **Action** heading and the list of available options will display.

Please note that the list may vary depending on which page the user is on.

The Traffic Light meanings do change slightly depending on what page is being viewed, the top of the page will always show a Key to the colour codings.

Completed Jobs

The ‘Completed Jobs’ page layout is very similar to the Work In Progress page. It displays all completed jobs with access to view the reports and its history .



The user can view similar information with an additional link to the Results Certificate PDF file also.

Also when it was booked in to when it was completed. What classification it was given and when its calibration expires next.

This page displays the status that the users equipment is currently in.

From the **Action** drop down list the user has the options to:
Transfer, Bond, Unbond and add to Dispatch.

Note: hover over the Classified column to see what the Classification means.

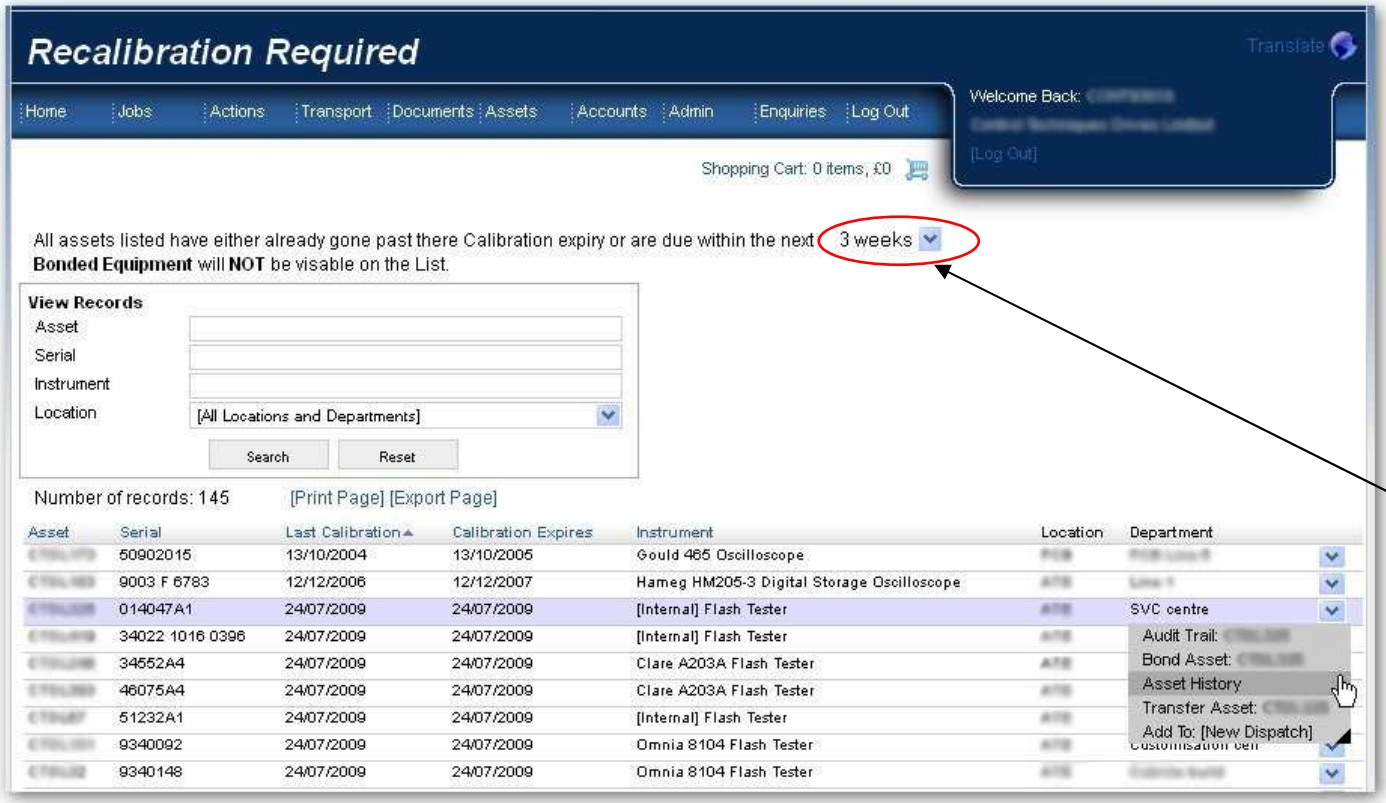
Also, use the search function at the top of the page to narrow your results.

Click the Job Number (in blue) to view a PDF copy of the Results Certificate.

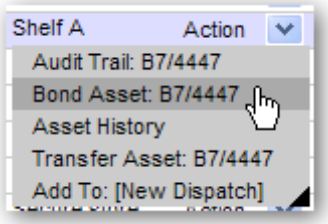
Recalibration Required

All the assets listed on this page have either gone past their calibration expiry date or are due to expire soon.

Please note, this list excludes all bonded items.

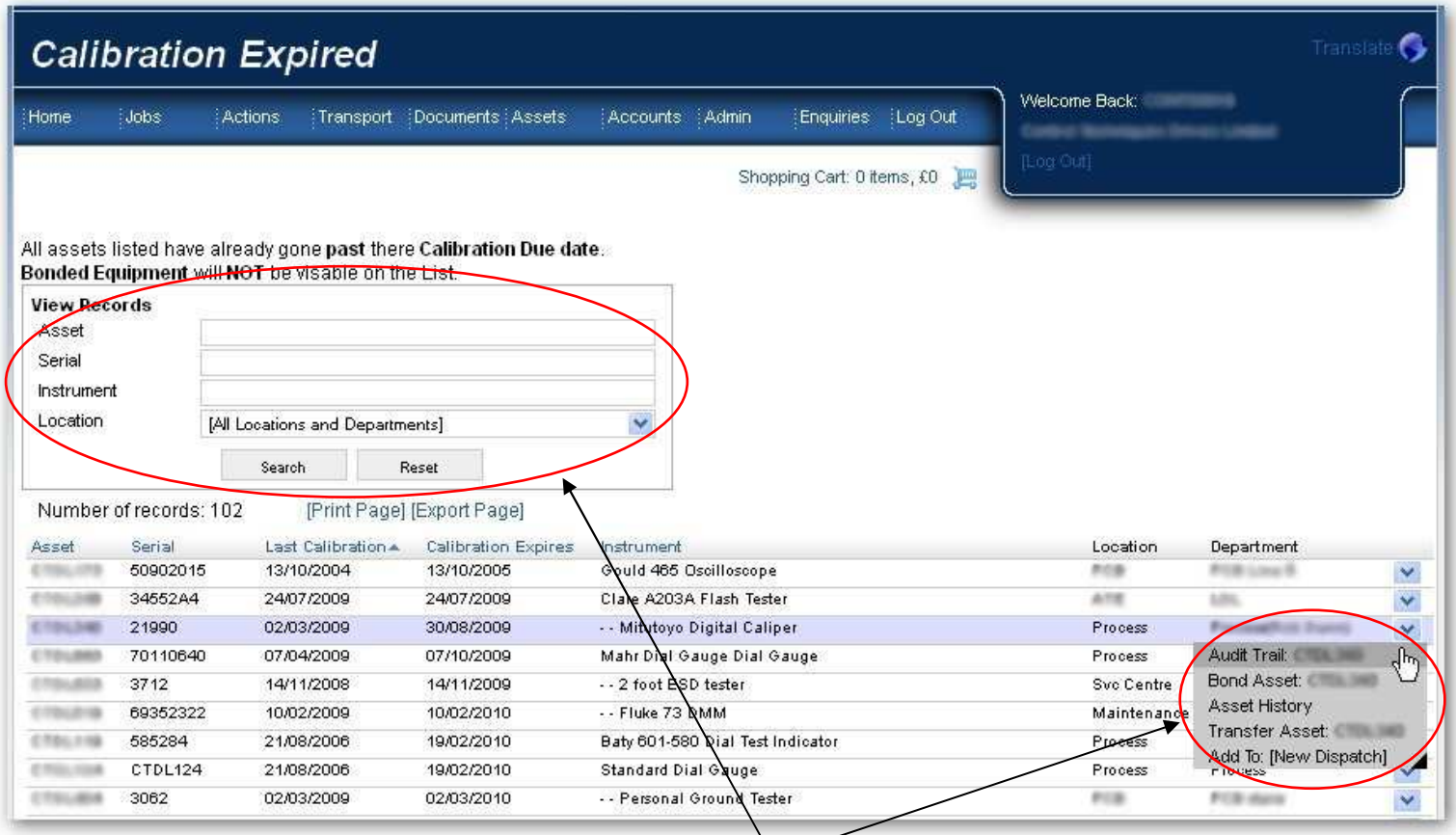


From the **Action** drop down list, the user has similar options to the 'Completed Jobs' screen.



The user can expand the expiry time frame, to view equipment that Calibration will expire up to 16 weeks in advance using the dropdown list feature. This can be set per user.

Calibration Expired



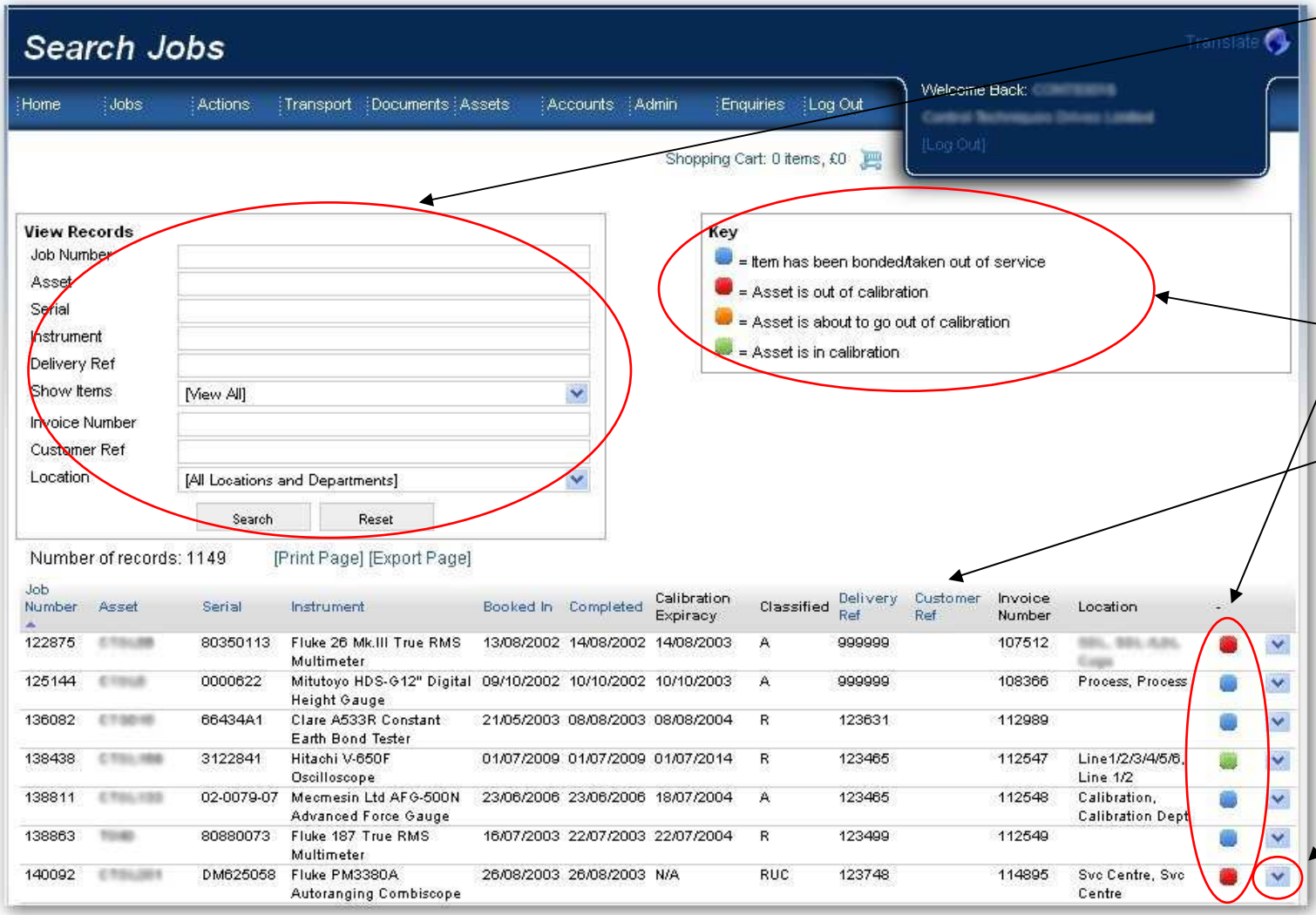
Again, several options can be taken from the **Action** column

If the user knows that one of their instruments has already gone past its date, they can use the search box instead of reading through the list. Just enter either the asset number, the serial number or the instruments name then click **Search**

Add to : [New Dispatch] will jump directly to the Dispatch section.

Search Jobs

The user can use this page to search for a specific job or instrument, which saves time, rather than searching through all the other pages first.



Search by job number, Asset, Serial, Instrument, Delivery reference or Invoice Number.

The user can enter which criteria they want to search by and click **Search** to display a list of results based on this criteria.

Again, the user can see what status the equipment is via the traffic light system.

Note: remember if the headings on the table are blue instead of black that means the information can be sorted by that column.

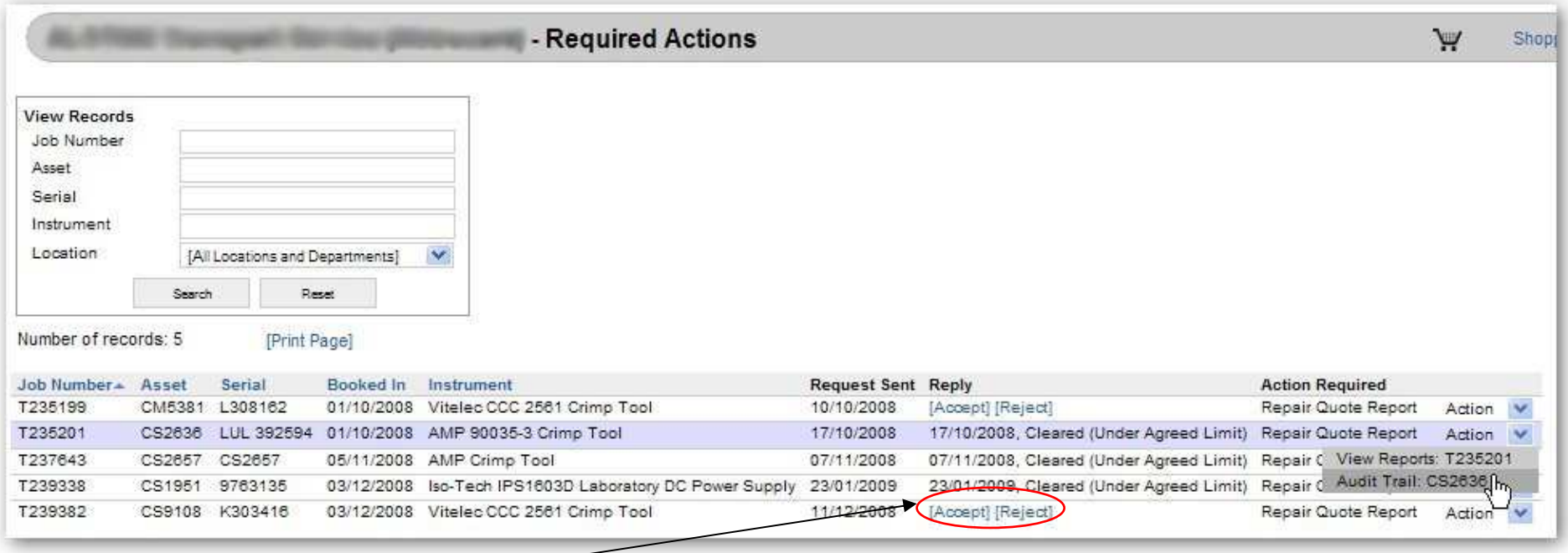
The **Action** drop down list gives the user the same generic options like the other web pages:

Section 5b – Actions

Required Actions

The **Actions** page shows the user what instruments they have that need a response from them before it can progress any further.

From the main Navigation panel on the left, if there are any, eg. **Required Actions (5)** from the customer, these will show beside in brackets.



A single click on **Accept** or **Reject**, will forward to the New Enquiry screen and the customer can enter further details.

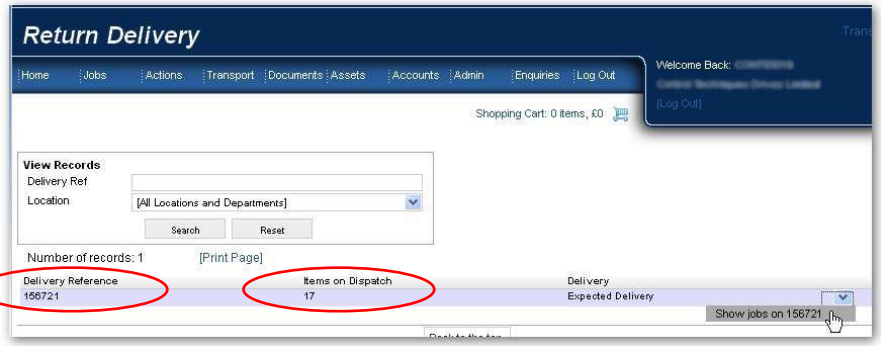
As explained on previous pages, the user has the ability to search via job number, asset number, serial number and instrument name.

Section 6 – Transport

Under the **Transport** section of the menu are the pages to view what Electroservices are returning to the customer or what Electroservices are expecting to receive from the customer. The user can also view the proof of delivery note so they have a clear view where all their items are located.

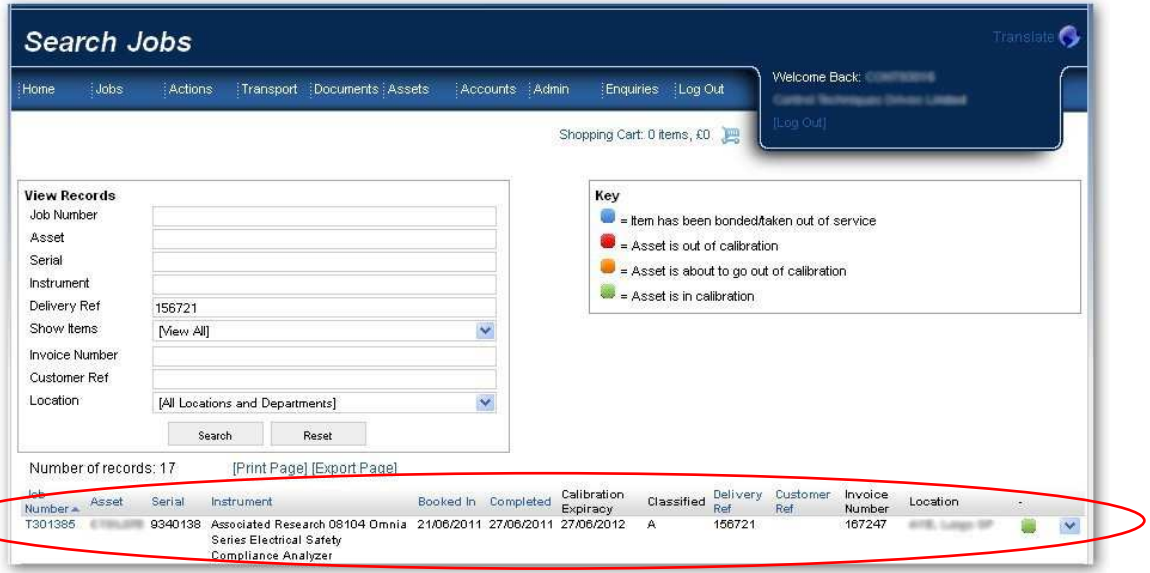
Return Delivery

This shows any delivery notes in the system and how many items are on it



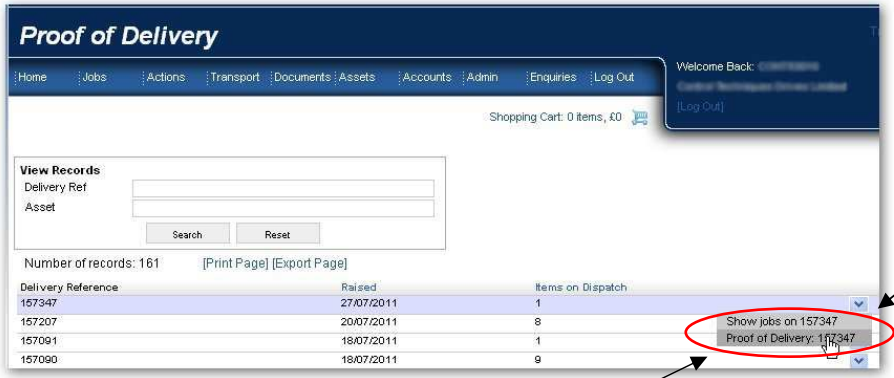
If the user hovers over the **Action** column and then clicks **Show jobs**, for a particular delivery reference, it views all the jobs for the items that are being returned to the customer.

If the user selects to view the jobs, it directs them to the **Search Jobs** page, automatically completing the search criteria by delivery reference so it displays a list of all the jobs from that delivery instantly.



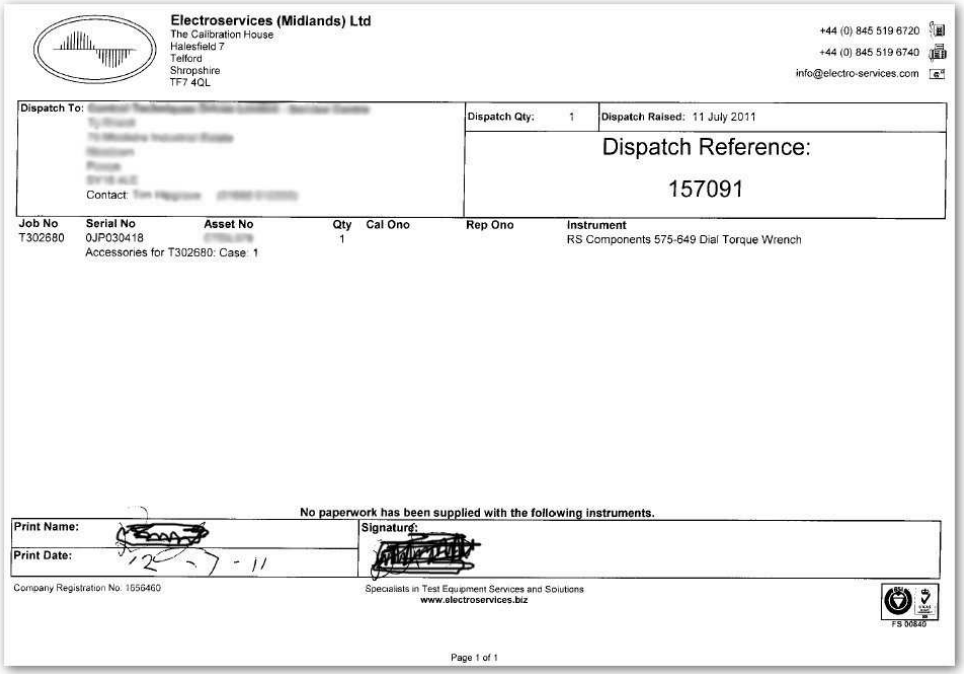
Proof of Delivery

The **Proof of Delivery** page keeps record of all of the users return deliveries. From the **Action** dropdown menu, the user can view the jobs on each delivery and the customer signed copy of delivery note.



When the user clicks to view all jobs that are on the delivery. It redirects them to the **Search Jobs** page displaying the jobs on that delivery (as in Return Delivery)

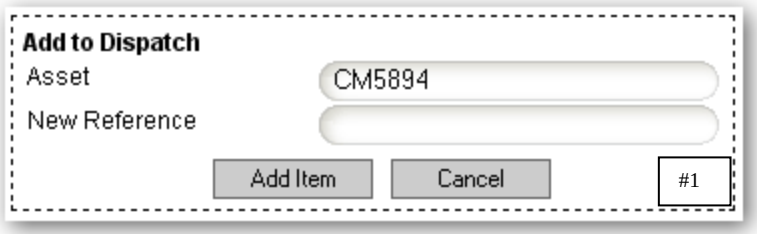
If the user clicks on **Proof of Delivery**: 123456 it will open a PDF document showing a signed delivery note.



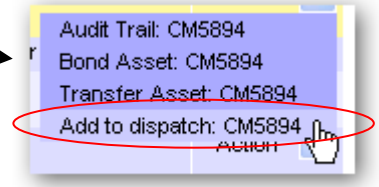
Dispatch

This section is for customers' users to generate a dispatch note, with equipment and what type of service they wish for Electroservices to perform along with any additional information – this is signed by the Electroservices driver, and for the Customer to keep, a copy can be sent with the equipment if required.

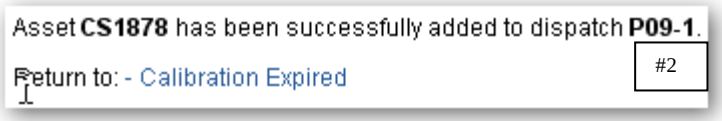
Creating or adding to a new Client Dispatch to Electroservices is now easier, this can be achieved from either the new **Action** column as in the previous screens



This shows what users would be shown, if required to use the option to **Add to dispatch**

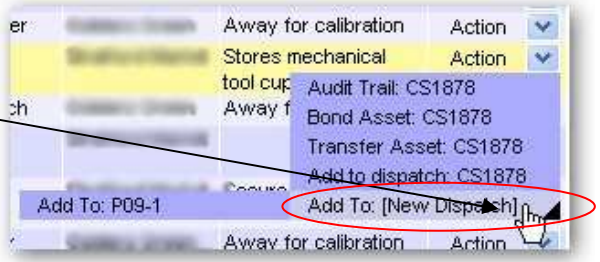


The user must add a New Reference number here, e.g. **P09-1**, then click the **Add Item** – the following will be shown once completed

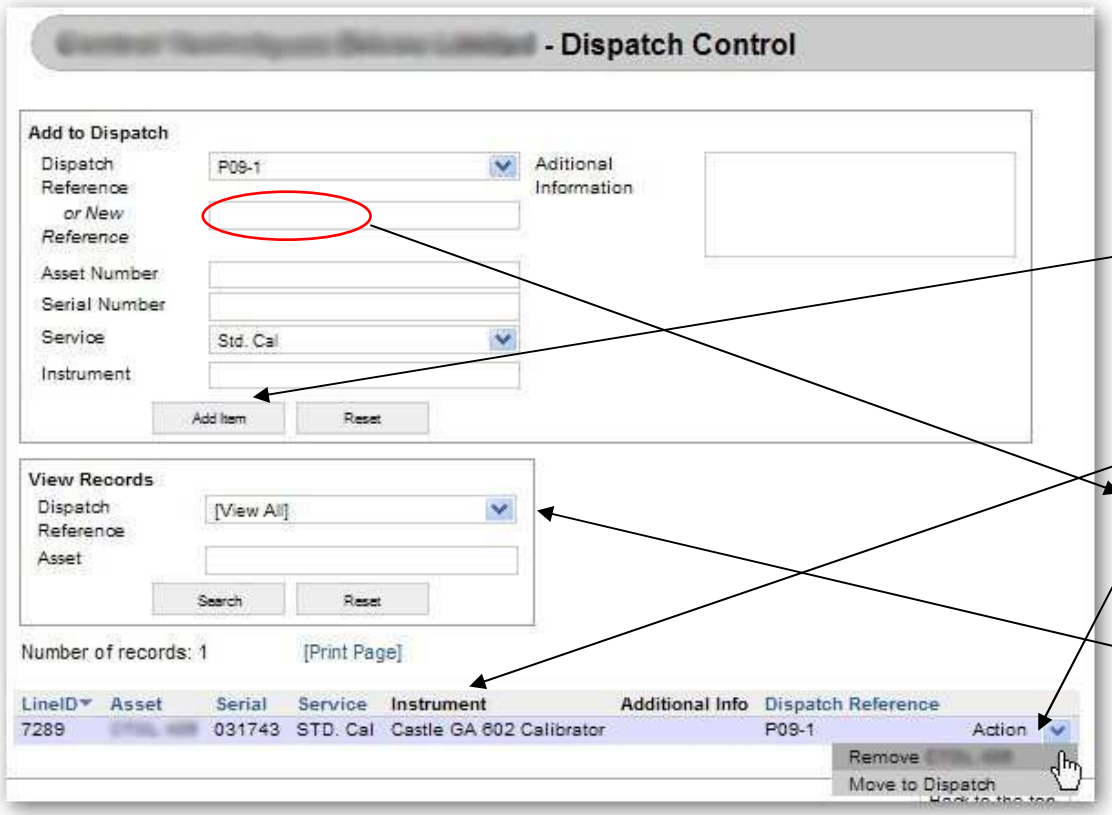


Note, if there are already Dispatches currently in progress, the user will see a black triangle on the Dispatch line, and to the left the list of current open dispatches. Should the user choose **Add to: P09-01**, then again a similar message to image #2 above will be displayed

Clicking **Add To: [New Dispatch]** will present the user with a similar message to image #1 above



Alternatively, the user can navigate directly to the **Dispatch** *area* from the main menu



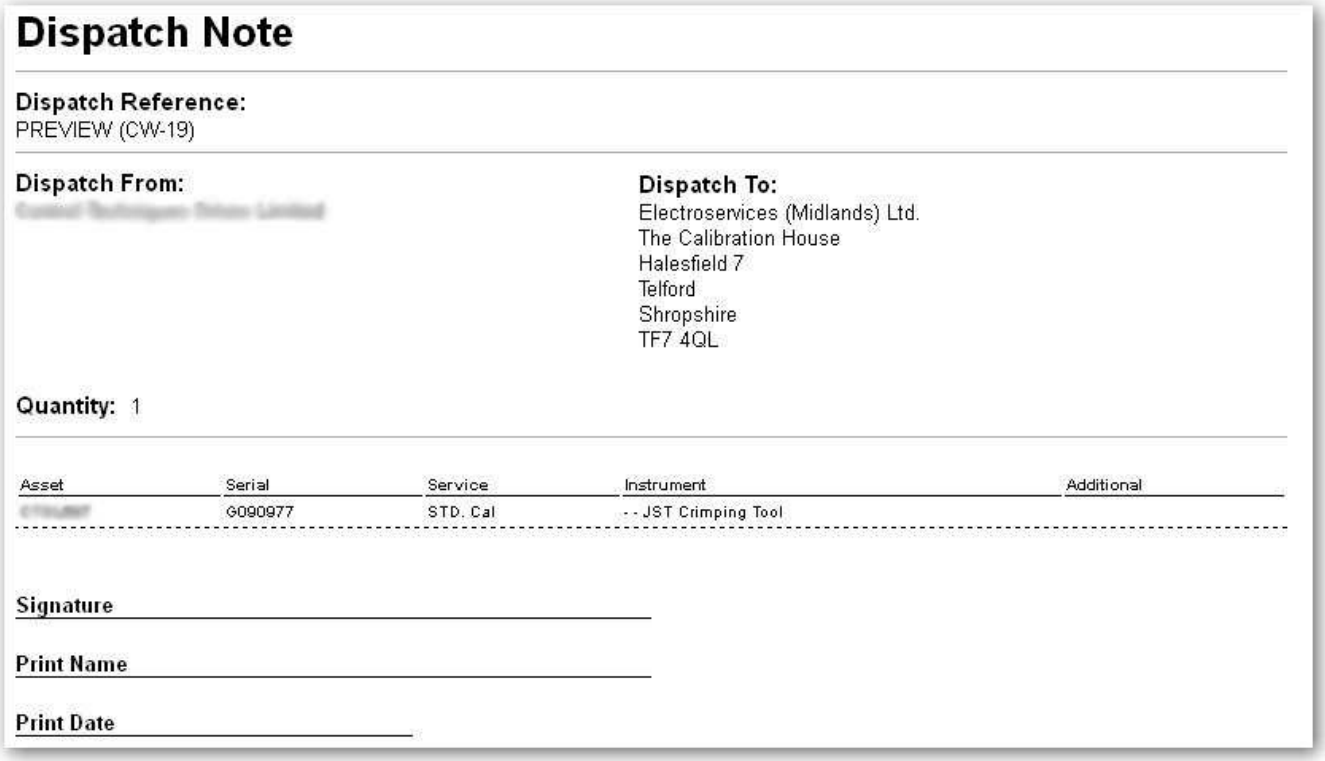
Enter an asset number that exists, if it is a new asset number that Electroservices may have never seen, please enter a Serial Number and Instrument description and andy additional information, then click **Add Item**

It will then be added to the list at the bottom of the screen. From here the user can move to a new dispatch reference or remove completely, as shown in the image

Alternatively users can preview the Dispatch by selecting from the **Available Dispatches** or searching for the asset if there is a long list – the choice is down to the user

Note, the user can preview the Dispatch Note or Submit and Print, or Rename the dispatch. Once submitted it will be removed from the list, and emailed direct to Electroservices.

Example of a Dispatch Preview



Dispatch Note

Dispatch Reference:
PREVIEW (CW-19)

Dispatch From:
[redacted]

Dispatch To:
Electroservices (Midlands) Ltd.
The Calibration House
Halesfield 7
Telford
Shropshire
TF7 4QL

Quantity: 1

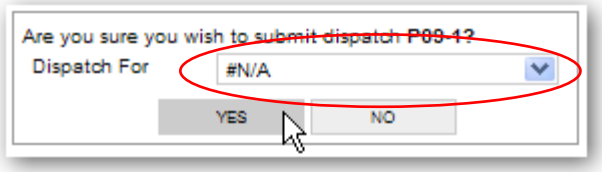
Asset	Serial	Service	Instrument	Additional
[redacted]	G090977	STD. Cal	- - JST Crimping Tool	

Signature _____

Print Name _____

Print Date _____

If Submitting the Dispatch Note, then the user will be shown the following :



If the client has multiple locations setup, the list of locations will be available for the user to choose where the Dispatch is originating from.

Click **YES** when ready to proceed – this step will not be displayed if the client is setup for a single location

Next, the following will be displayed, again the user will have the opportunity to print the Dispatch note or return to the Dispatch screen

The Dispatch Reference (example above) **zzzzzzz_100001_1135** is system generated, and will be visible in the Dispatch history, for subsequent enquiries.

Dispatch History

The Dispatch History will summarize all Dispatches from the client, clicking on the **Dispatch Reference** in the left column will show the detail of what was on the Dispatch Note

Section 7 – Documents

In the 'General Documentation' section, the user can view all files that they have uploaded to the website and upload new documentation.

Please note there is a file size limit of 2MB per file

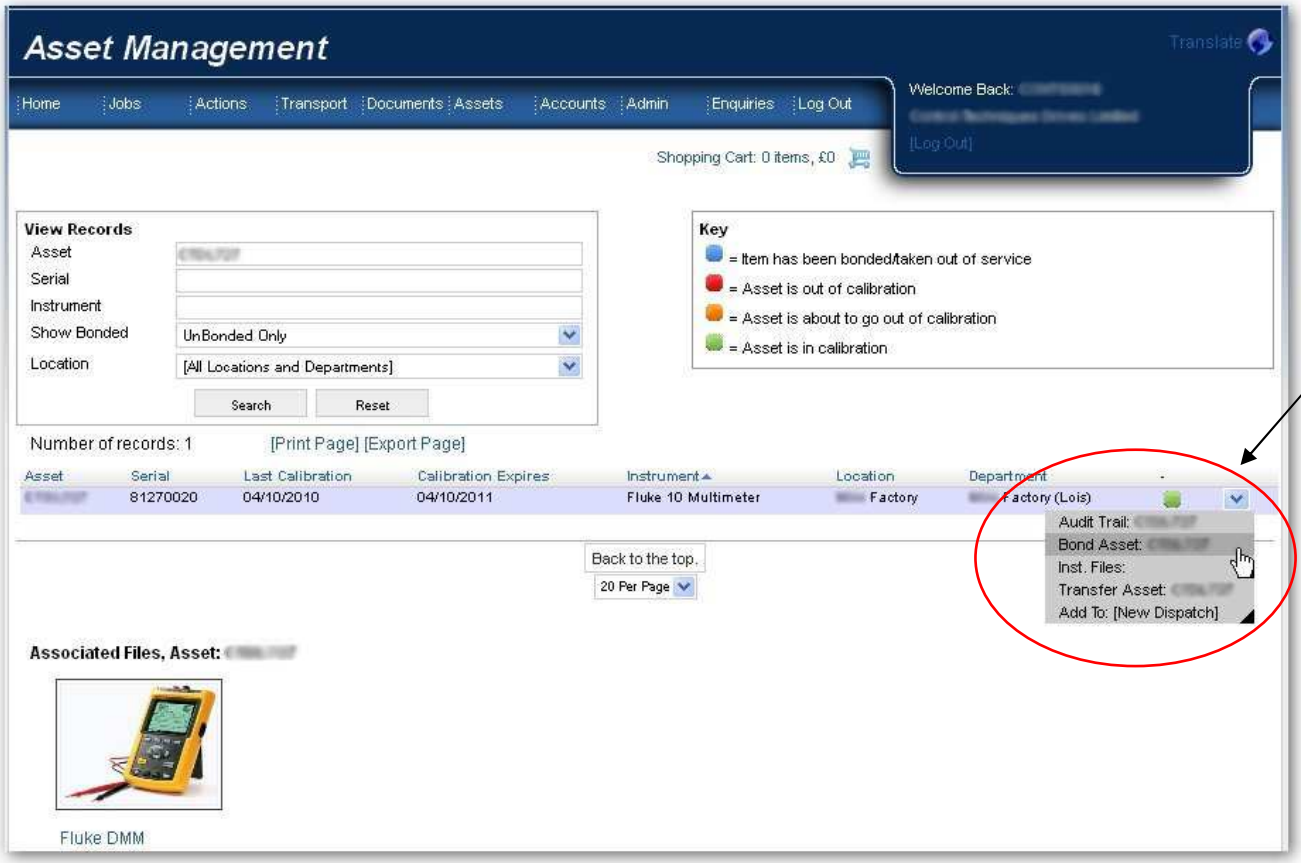
Allowed document types: -
Excel
Word
PDF
Image files (JPEG, GIF, PNG)
CSV

Once Uploaded, the documentation can be linked to an asset, and in the case of an image, if the asset or equipment type is viewed within the Asset Management section then the image will appear to show the customer.

Section 8 – Assets

Asset Management

This section gives the customer features to manage the location of their assets and track it's history, bond etc.
Please note: there must be a valid asset number for using this section as `-` is not valid.



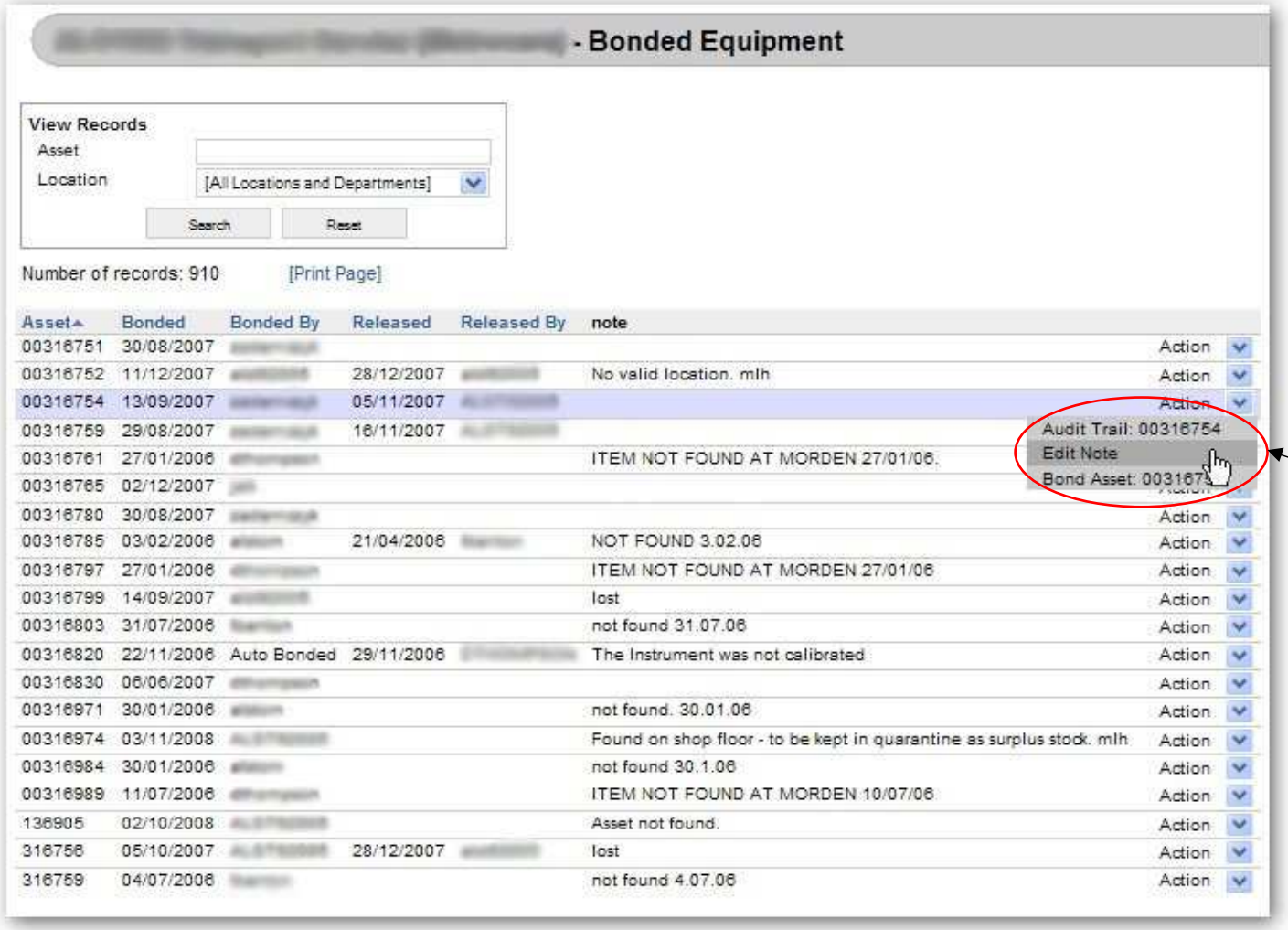
The initial list is a complete list, that can be filtered, by location, bonded etc. or searched.

If a specific asset or instrument type has any associated documents or images these will be displayed in thumbnails below, hovering over will show a larger image.

The **Action** column will again allow direct access to other functions.

Note: the Traffic Lights show the calibration status of each asset.

Bonded Equipment



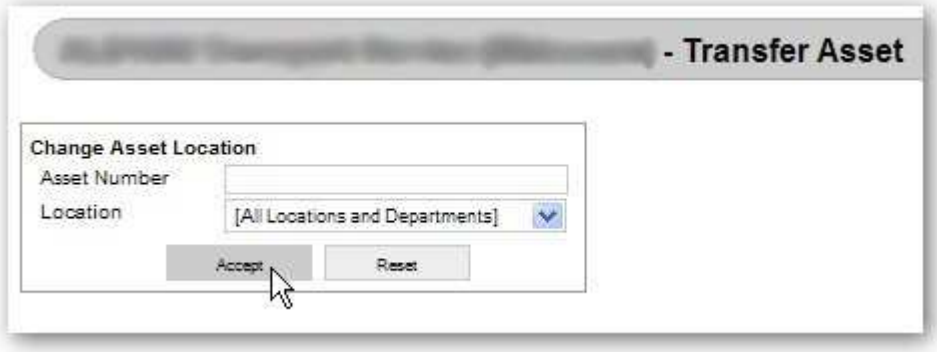
The **Bonded Equipment** page shows all the customers' instruments that are bonded – this means instruments that are no longer in active service.

When an instrument has been bonded, they are removed from the recall list but will still be kept on this page, so the user will have full visibility of the location of your equipment.

From the **Action** dropdown list the user can view the audit trail, edit any notes that have been entered against the equipment, bond or un-bond the asset.

Transfer Asset

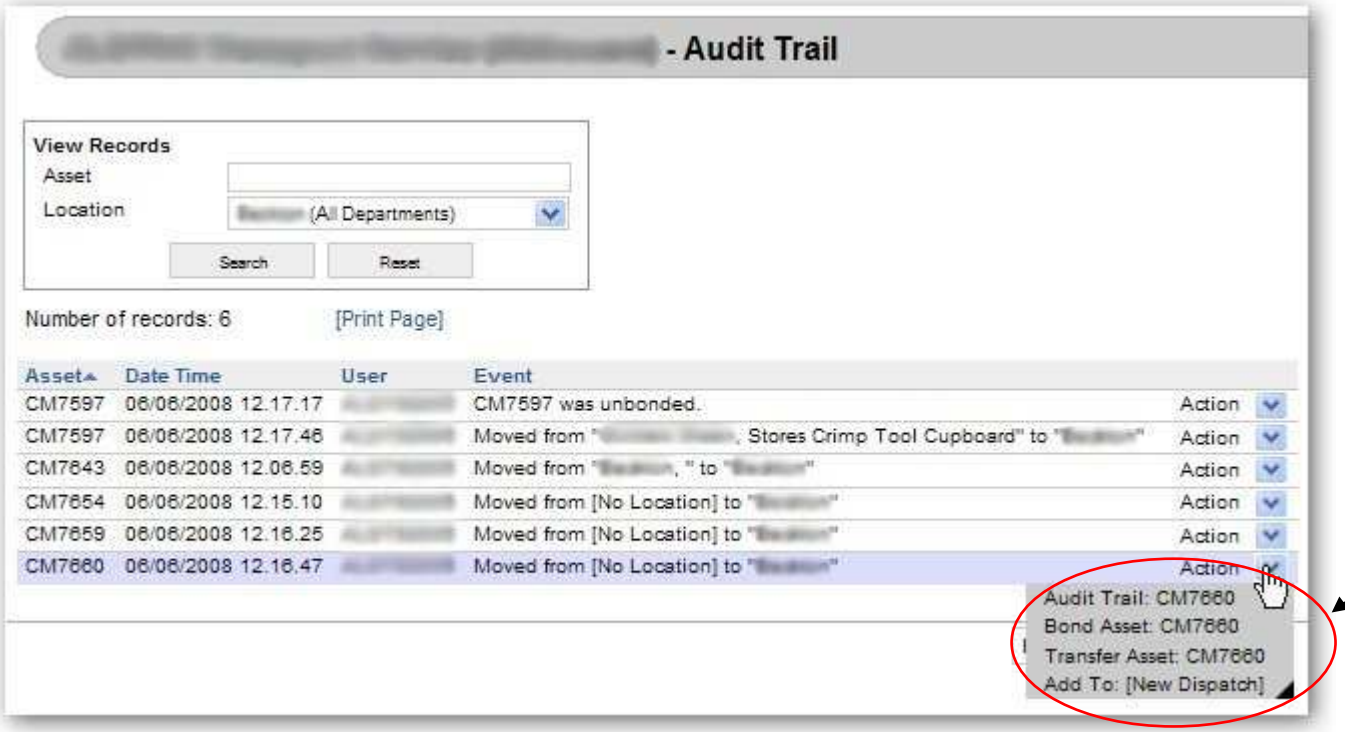
All that is required to transfer an asset is the asset's number and select which location the user wants to change it to from the dropdown menu.



If the user has selected from the **Action** dropdown list to transfer an asset, it will have pre-filled out the asset number field, therefore would only need to select a new location and click **Accept**

If the transfer was successful, this message will appear telling the user that it was transferred to their desired location.

Audit Trail



The user can also view a full audit trail on their instruments so that they have a clear visual of what has gone on with that piece of equipment.

The audit trail shows all of the bonded changes that have happen to the equipment and shows all its location transfers.

From here, the users can quickly transfer their equipment, bond or un-bond, simply, from the **Action** drop down list.

Stock Audit

The web site allows the user to process a stock audit of their own equipment, this has no bearing on the system, it is for the customers convenience.

The Stock Audit shows an overall list of active audits and at which location.

The user can also start new audit from this main page.

Once, the user has selected an active audit that they wish to view; it will display a list of all assets' that are expected.

The user has the ability to add assets to their current list as well. Once they have checked their stock audit and they have everything that is expected, the user can close the audit off.

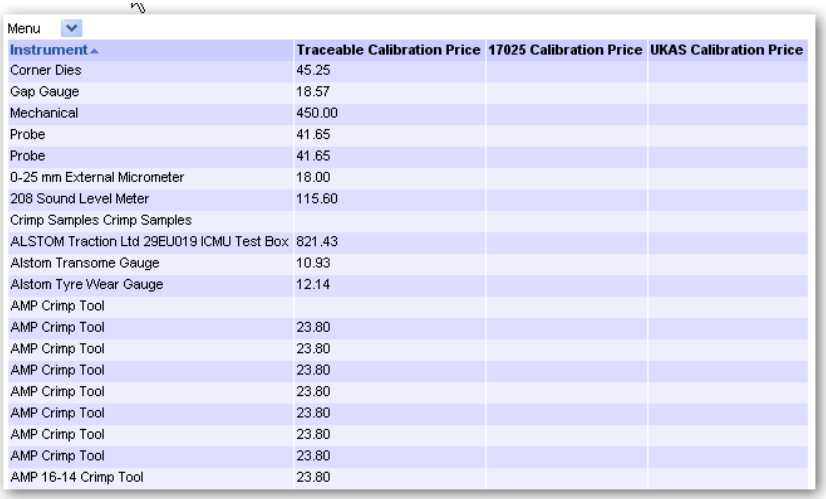
This Stock Audit History is available to view previous audits.

Section 9 – Accounts

Contract Prices

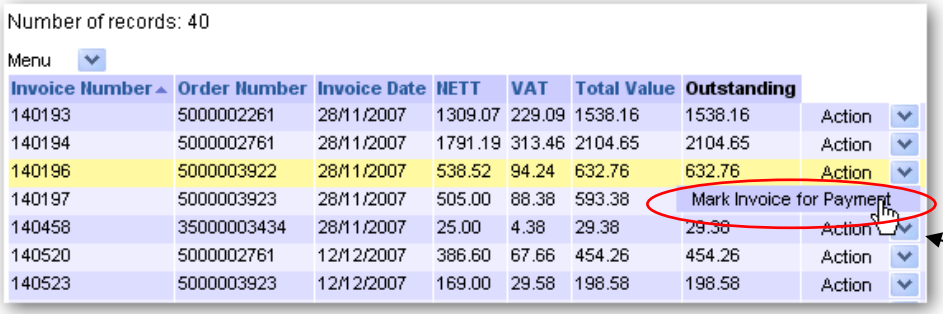
This listing shows the agreed contract prices between Electroservices and the customer.

This screen is for information only.


Menu

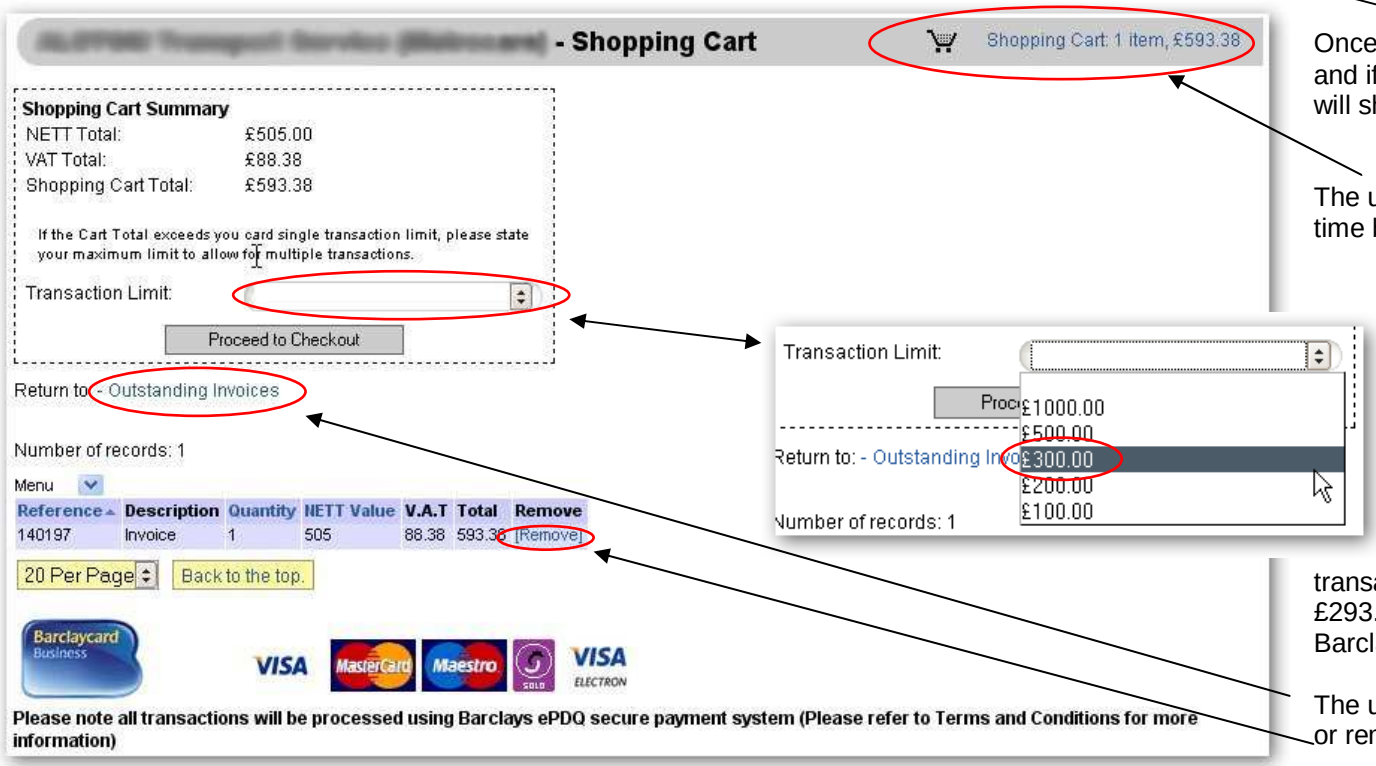
Instrument	Traceable Calibration Price	17025 Calibration Price	UKAS Calibration Price
Corner Dies	45.25		
Gap Gauge	18.57		
Mechanical	450.00		
Probe	41.65		
Probe	41.65		
0-25 mm External Micrometer	18.00		
208 Sound Level Meter	115.60		
Crimp Samples Crimp Samples			
ALSTOM Traction Ltd 29EU019 ICMU Test Box	821.43		
Alstom Transome Gauge	10.93		
Alstom Tyre Wear Gauge	12.14		
AMP Crimp Tool			
AMP Crimp Tool	23.80		
AMP Crimp Tool	23.80		
AMP Crimp Tool	23.80		
AMP Crimp Tool	23.80		
AMP Crimp Tool	23.80		
AMP Crimp Tool	23.80		
AMP Crimp Tool	23.80		
AMP 16-14 Crimp Tool	23.80		

Outstanding Invoices



This screen details invoices that Electroservices have issued to the Client and as yet have not been settled

Please note, this list is *real time* , Electroservices mark invoices paid, as soon as we have payment confirmation from Barclays



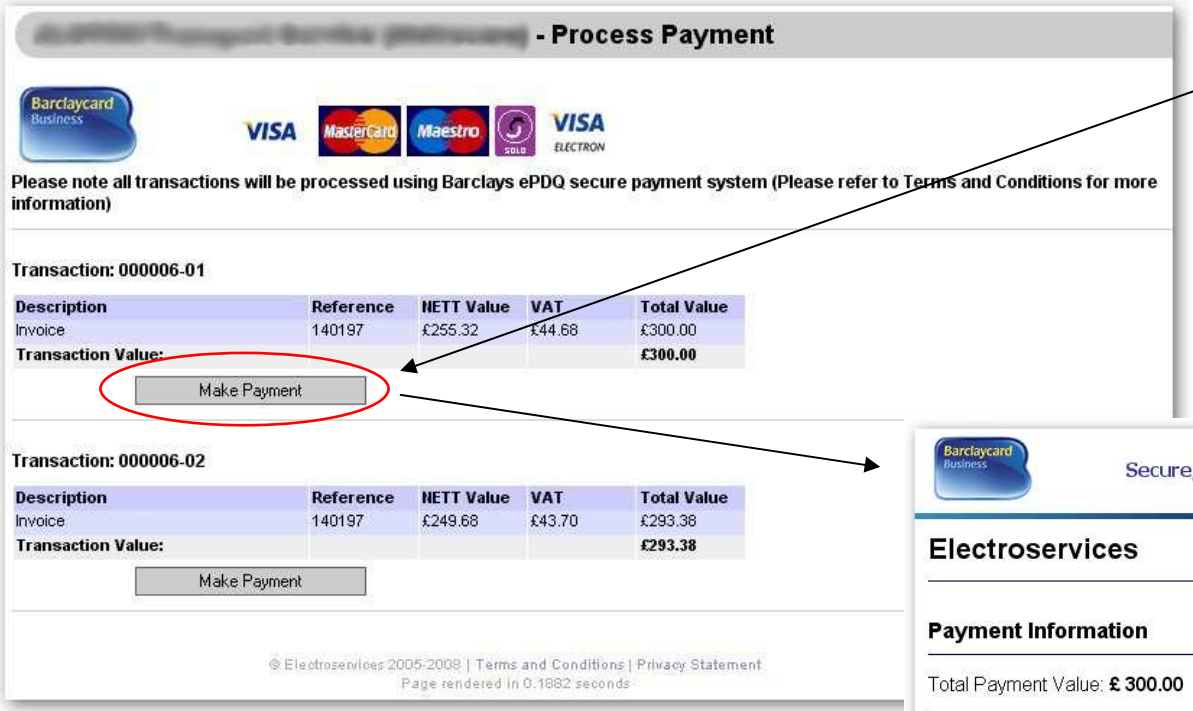
Once the user clicks **Mark Invoice for Payment**, and if there are any matching records found, it will show :

The user can jump to the Shopping cart at any time by using the link above

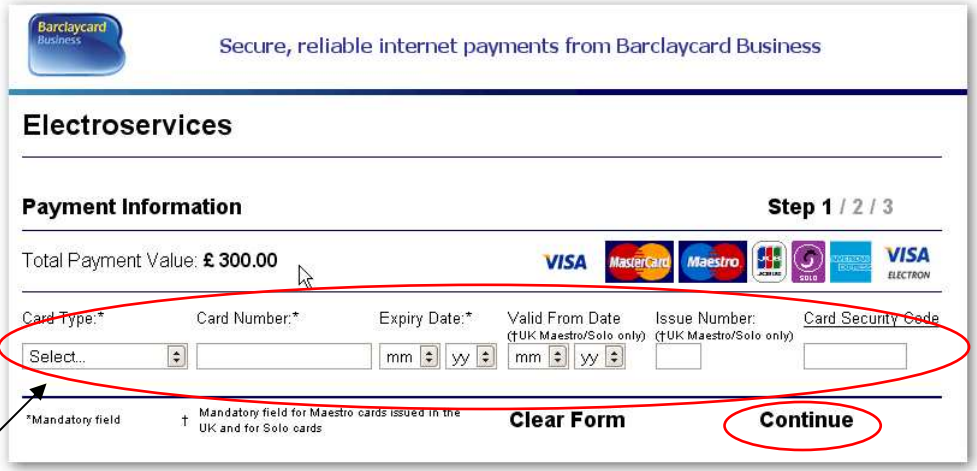
Should the Client's user have a 'transaction' limit on their card, a maximum for this session can be set by using the drop down selection, this will then tell the system to split the total into transaction bundles, e.g. £ 593.38 total with a limit of £300.00 per single transaction would be split into £300.00 and £293.58, there would be two sessions into Barclays ePDQ to make the payments

The user can return to the Invoices or remove a wrongly added invoice for payment

Once clicking **Proceed to Checkout** the user is then presented with the payment summary, and as previous, should there be a limit set per transaction, then it will automatically be slit accordingly



Click the **Make Payment** to proceed into Barclays ePDQ secure server for payment

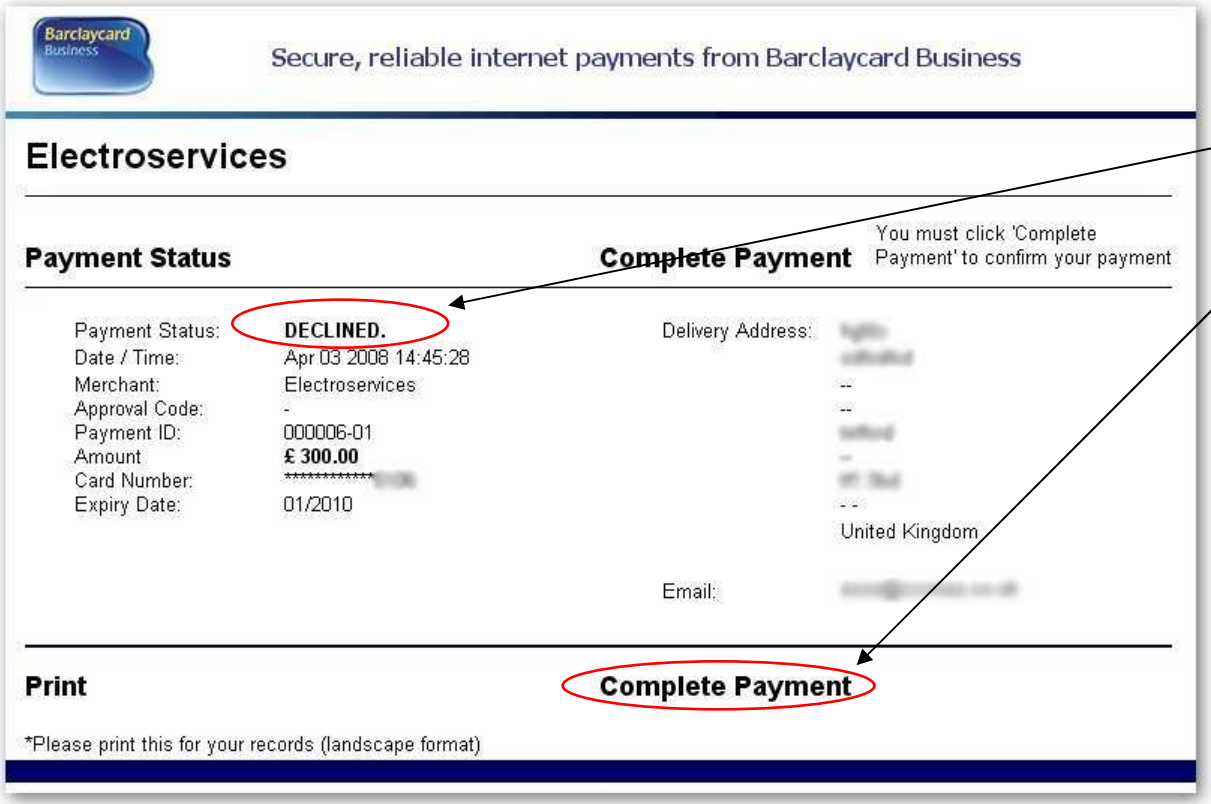


Steps 1 / 2 / 3 from Barclays ePDQ system are standard secure payment screens, they prompt for the card type, number, expiry date, (valid date and Issue number for Maestro / Solo cards only) and the 3 digit security code number

Then Click *Continue* for Step 2 is the card holder registered address, and Step 3 is the delivery address (this is not applicable at present)

* Please note, Barclays Business, change the screen layout and details periodically, Electroservices have no control over this.

The next set of images show a Declined transaction

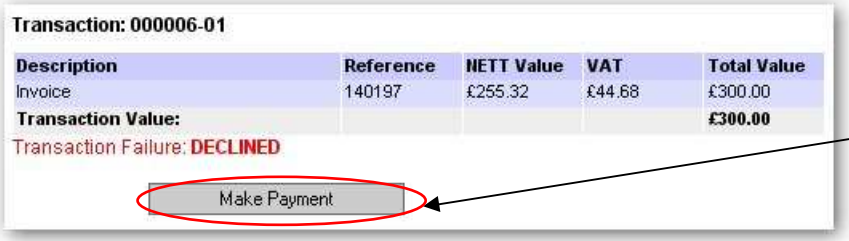


Should the user enter incorrect card details, they will be presented with the following Payment Status screen with a **DECLINED.** status

As stated, you will be required to click the : **Complete Payment** link below to return to the Electroservices website

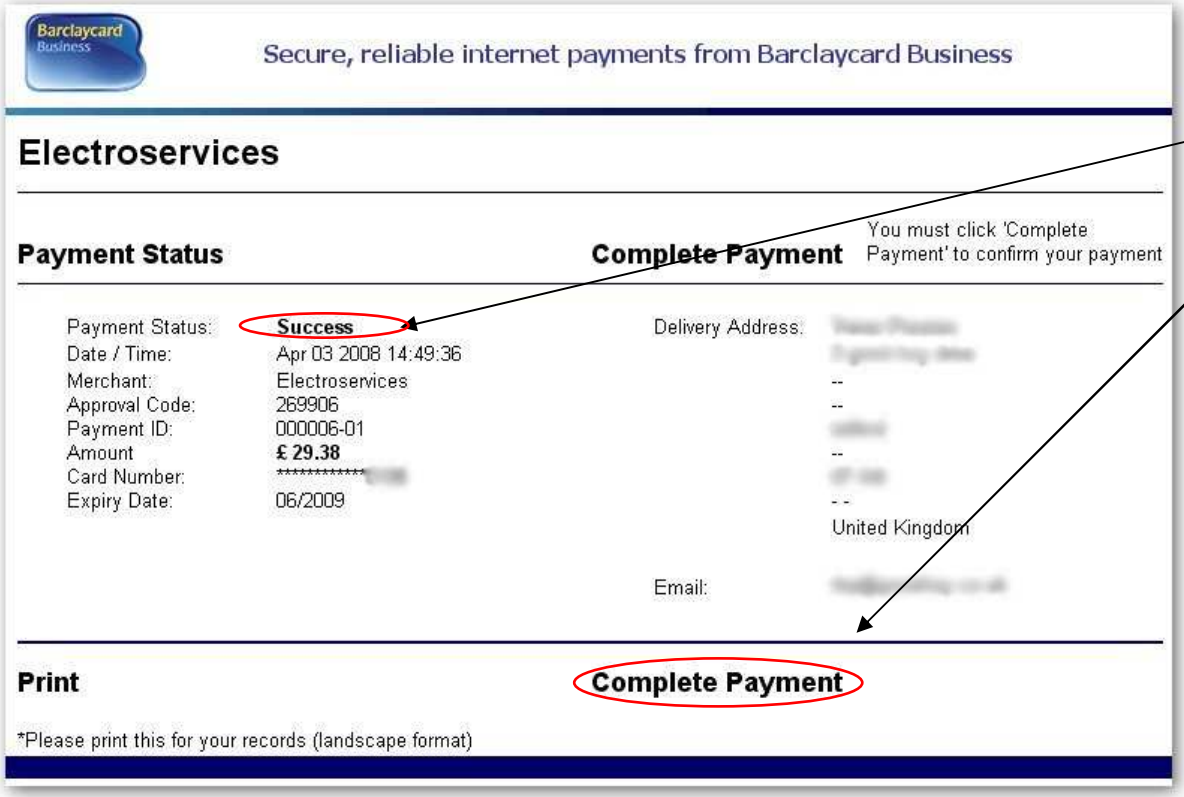
* Please note, if a DECLINED transaction continues, it will need the user to discuss with the Card Issuer/Bank as to the reason for the decline - Electroservices have no information or control over this.

Once clicked, the Electroservices website will display the transaction status returned by Barclays, in this example the user will see:



The user then can retry by clicking the *Make Payment* button again, and repeat the process with correct details inside the Barclays ePDQ secure site

The next set of images show a Successful transaction

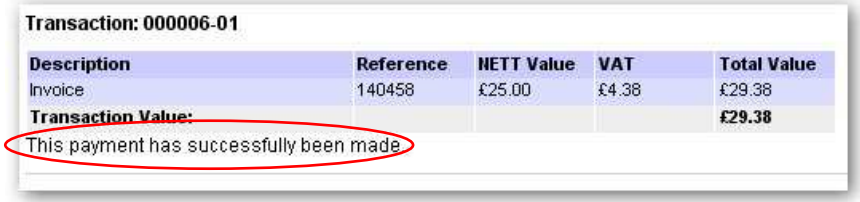


Should the user enter incorrect card details, they will be presented with the following Payment Status screen with a **Success** status

Similarly, as stated, you will be required to click the : **Complete Payment** link below to return to the Electroservices website

Note, the Client / user should print this screen receipt for their records.

Once clicked, the Electroservices website will display the transaction status returned by Barclays, in this example the user will see:



Repeat the process for any further transactions that require payment

If complete, the user will see, All transactions are now complete,
Return to: **Main Site** click to return

All Invoices

All invoices Paid or Unpaid will be shown

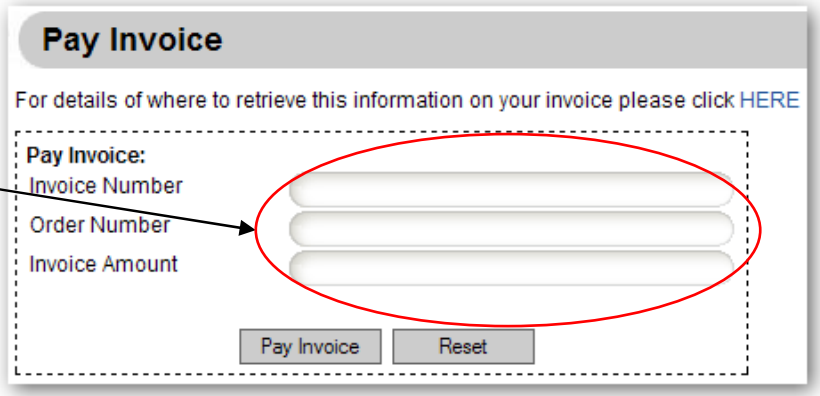
(Please refer to section 9 for further notes)

Click here to view a PDF copy of the invoice, or show the jobs on the invoice.

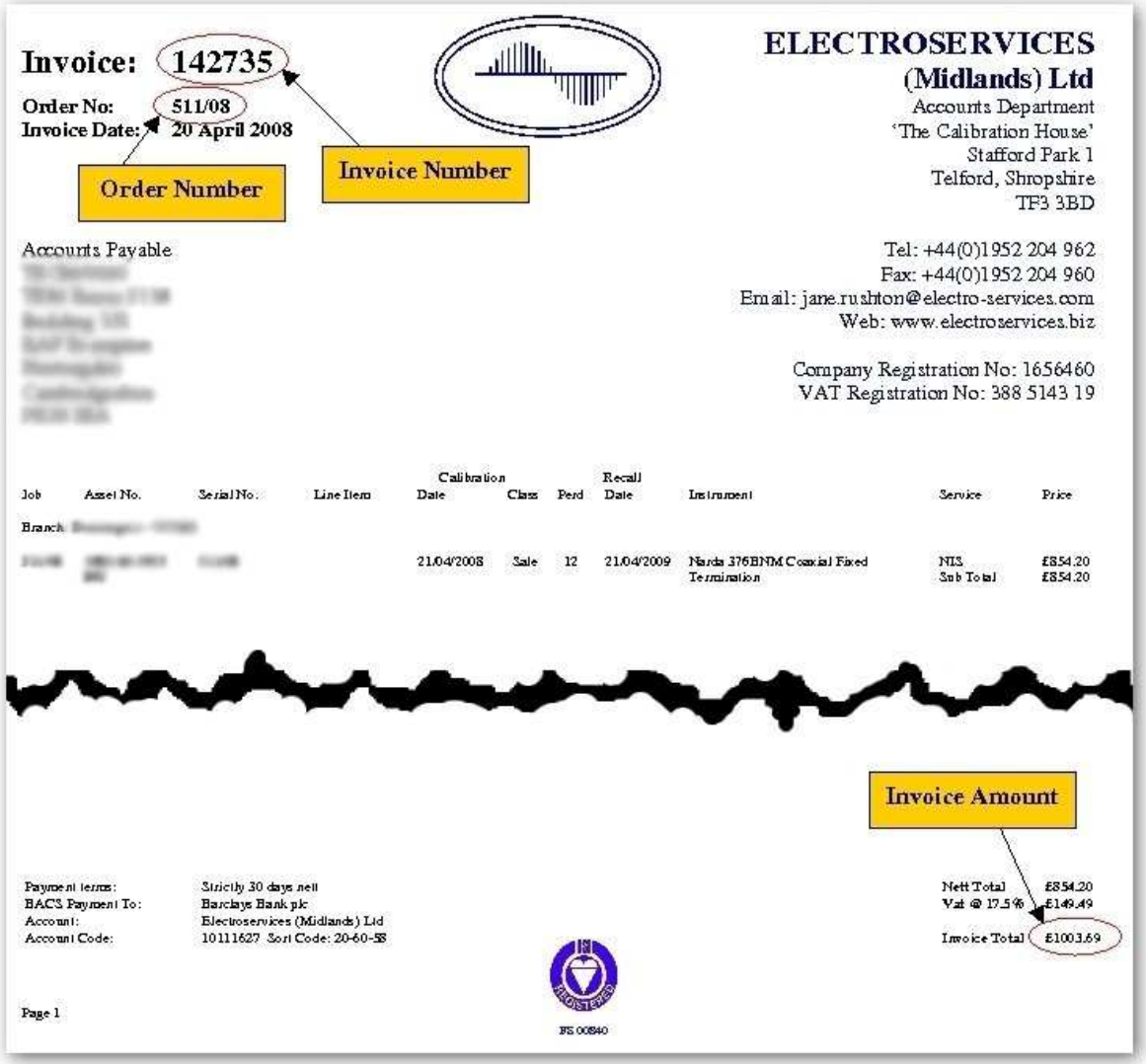
Single Invoice Payment

Invoices can also be paid singularly without logging into the client area, via the main navigation menu

All three pieces of information are required to complete the transaction – see next page on where to obtain the details



Example: Electroservices Invoice



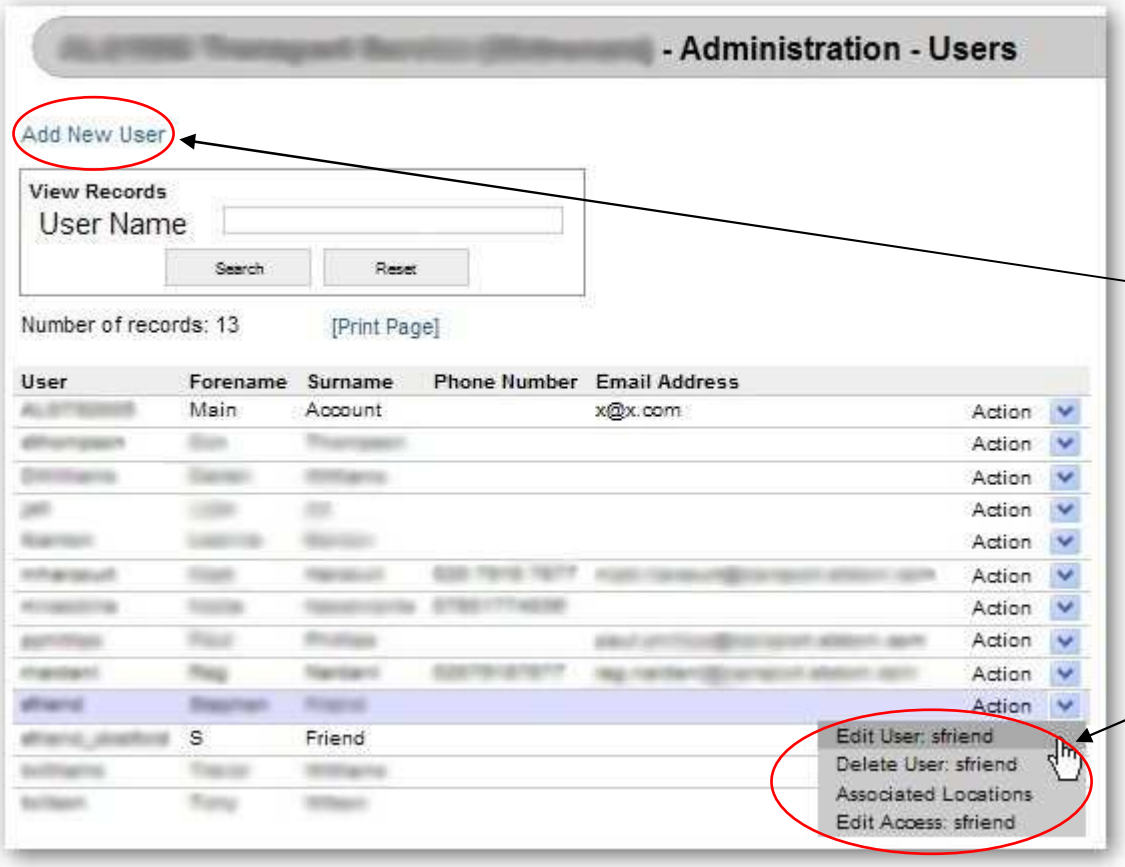
When the correct details are entered, the following screen will be displayed.

Click the **Make Payment** to proceed into Barclays ePDQ secure server for payment – as shown in section 9

Section 10 – Account Administration

In the Account Administration section, only the main Administrator account (setup by Electroservices) have the ability to access this area.

User Control



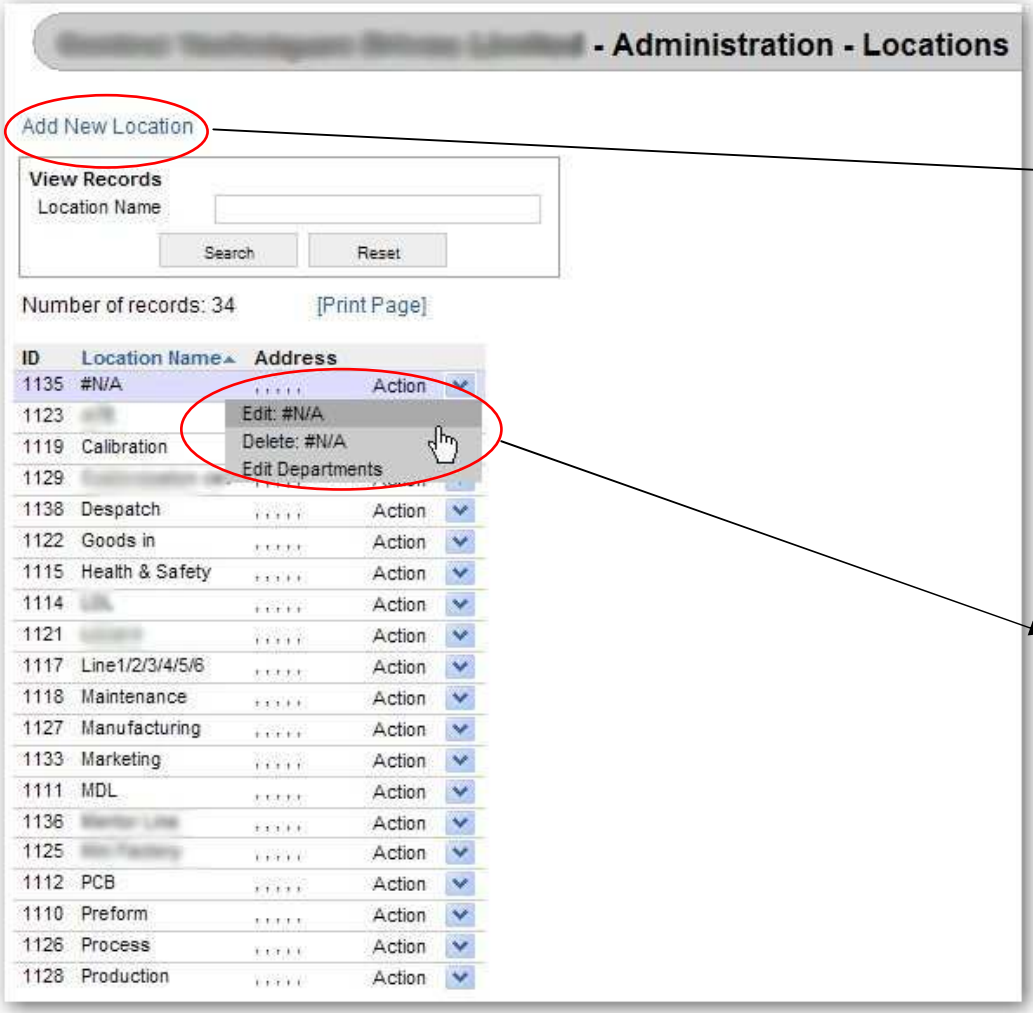
The User Control shows a complete list of all login id's that have access to the client area, for a particular customer.

The administrators can add new users to the list by clicking on the **Add New User** link in the top left hand corner. Just fill out the new users details and click accept.

Next to each user is an **Action** dropdown list, where the administrators can either edit, delete, edit access and associate locations for the user selected. **Associated locations** is a feature, which allows the administrators to grant visibility to certain locations for the user selected.

Locations

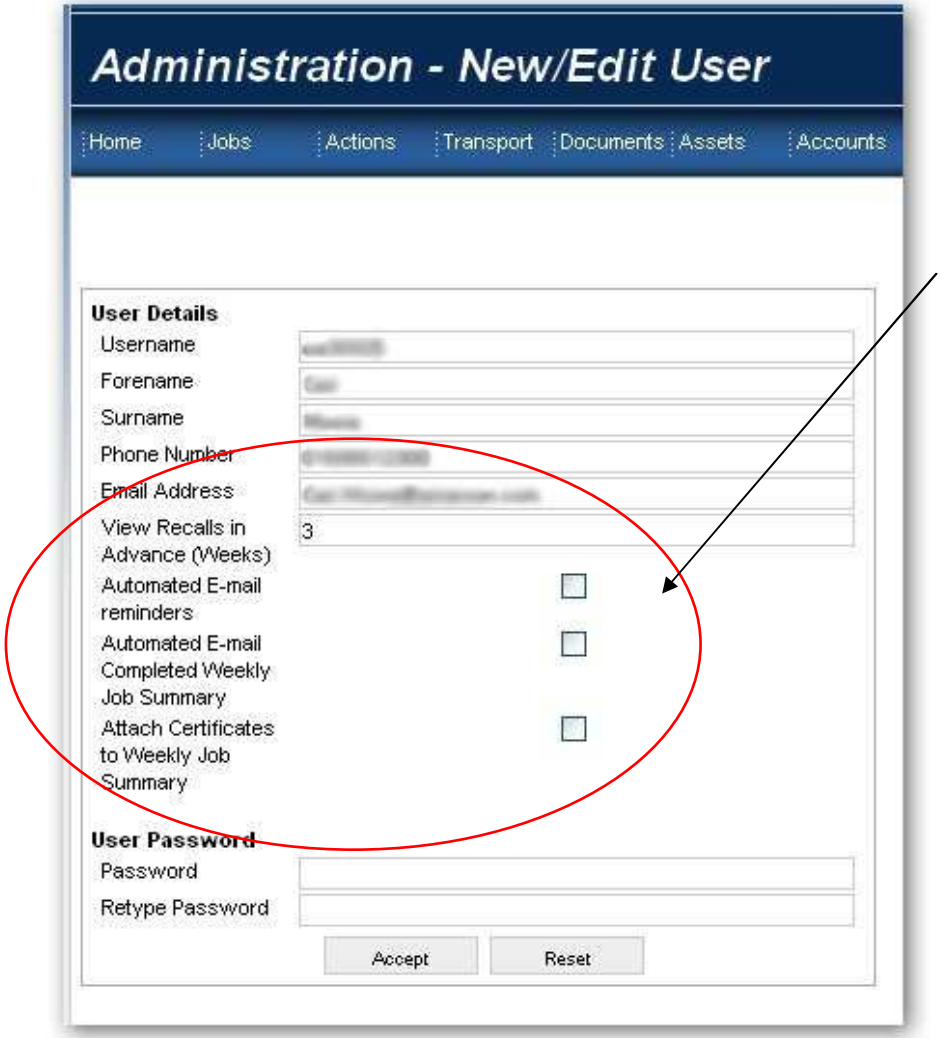
The Location' page displays a list of all current locations with address details.



From the **Action** dropdown list, the administrators have the ability to edit, delete or edit the selected locations departments.

New locations can be added to the list by clicking on the **Add New Location** link in the top left hand corner. Just fill out the new location details and click accept.

Change Password/Contact Details

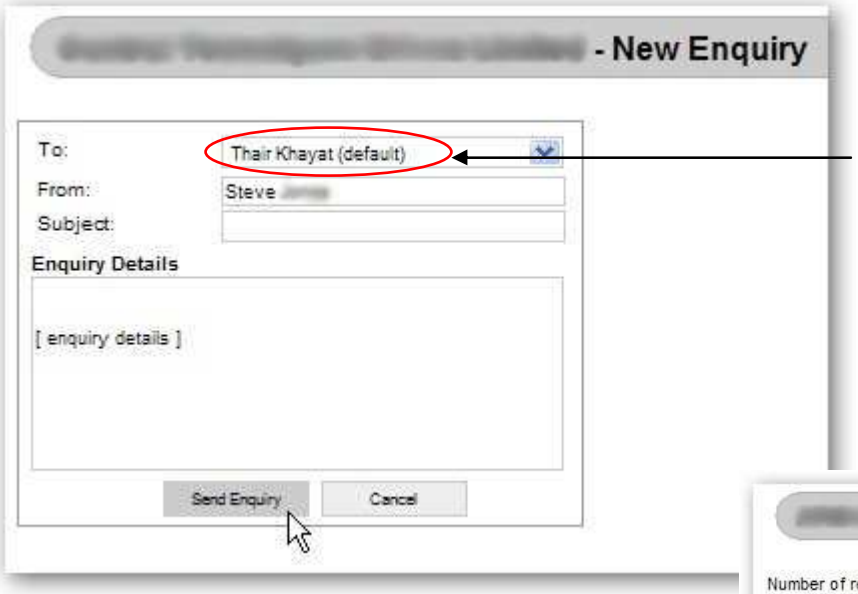


Every user can change their own contact details from here.

Click the check box for automated email reminders – Recalibration Required, they will be sent once a week and show all assets that have expired or about to expire within the number of weeks shown here.

Users can have an emailed summary of completed jobs – weekly and a zip file of PDF certificates if required.

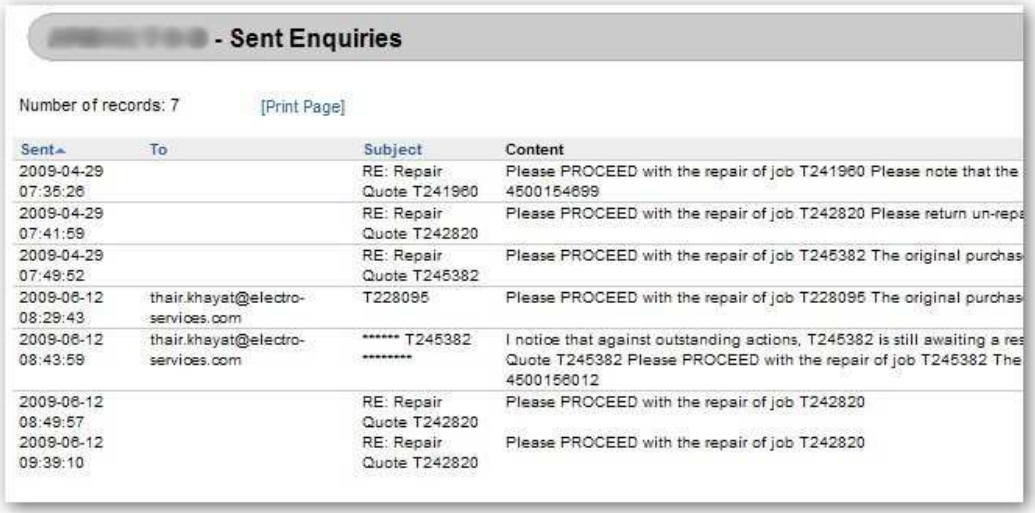
Section 11 – New Enquiry



The same way you would normally send an email, select from the drop list who the recipient is. Add a subject, type in your enquiry and click **Send Enquiry**.

Sent Enquiries

The Sent Enquiry page is basically a table that displays the history of all enquires that have been sent to Electroservices via the web site.



Section 12 – Technical

Scripting : The site has been designed and developed to run without the requirement of any “client side” specific scripting e.g., JavaScript of VBscript (there are places where client scripting is utilised, and if the client is setup, can improve the user experience if desired)

Resolution : Whilst best viewed at a desktop resolution of 1024x768 – this is not mandatory but again recommended for an improved user experience

Browser : The site uses style sheets for the design, whilst we recommend Firefox 3.x it has been tested with Internet Explorer 5, 6 and 7; Firefox 3.x, 4.x and 5.0, Google Chrome, Opera and K-Meleon – please note certain graphical elements do vary slightly between applications and versions, but all functionality is complete through all specified applications.

Security : The site uses Blowfish data encryption for the cookies

Cookies : The users session data (i.e., logon verification), is stored in a cookie on the client pc, this is mandatory for use of the client area, please note no personal or identifiable information is collected from these cookies by Electroservices – please read the Privacy Policy for more information

Database : Electroservices use MySQL Relational database for speed, reliability and scalability

Payments : Client details for Credit Card payments are **NOT** collected or stored in any form by the Electroservices website – please refer to the latest Terms and Conditions and Privacy Policy on the website for full details

Section 13 – Document Version History

Revision	Status	Date	Change	Author
1	Issued	15/06/2009	Amended to include full website functionality	TBP
2	Revised	01/07/2011	Site redesign, images amended	TBP